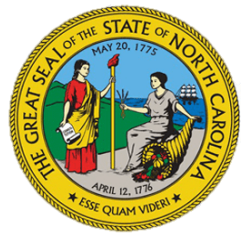


North Carolina COVID-19 Vaccine Management System (CVMS) **Provider Portal**

Check-in recipients and document vaccination User Guide

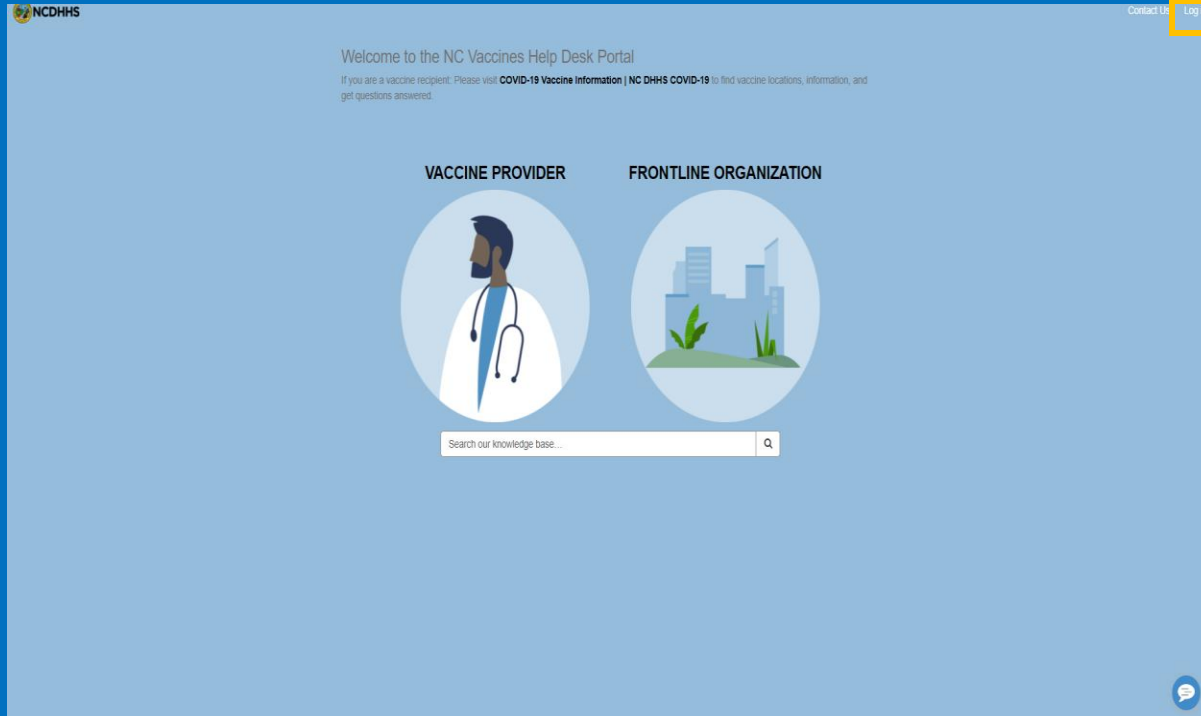
Version 23

April 1, 2022



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the NC Vaccines Help Desk * at

https://ncgov.servicenowservices.com/csm_vaccine

You can also call the NC Vaccines Help Desk at **(877) 873-6247** and select option 1.

The NC Vaccines Help Desk is available during the following hours:

Monday to Friday: 7 am – 7 pm ET

Saturday: 8 am – 4 pm ET

Sunday: Closed

* On the home page of the NC Vaccines Help Desk Portal, select **Login** at the top right-hand corner, then select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the NC Vaccines Help Desk Portal will have to follow the steps below:

1. Register for an account by clicking '**Login**' then '**Register**' on the left side of the screen
2. Populate your first name, last name, business e-mail, and registration code

Note: If you do not know your organization's registration code (ORG-ID), please contact the help desk

3. You will receive an e-mail with your username and temporary password to log into the portal

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Overview

Overview



[Home](#)[Recipient](#)[Appointments](#)[Slot Management](#)[Help & Information](#)

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appoin

TIME

Mar 09, 21, 05:01 AM

Mar 09, 21, 01:17 PM

Mar 09, 21, 01:25 PM

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Space Test

Date Of Birth

MM/DD/YYYY

Email

Search Email

Search

Search Results

Name	DOB	Email	Vaccine
Space t Test	1997-03-17	rohiniuat@mailinator.com	Group

Please be sure to bookmark this site: <https://uat-ncdhhs.cs33.force.com/VaccineProvider>

In this User Guide, we will discuss how the Healthcare Provider will be able to create recipient records, register recipients, book appointments for recipients, record the details of their vaccine administration, edit the recipient’s information or vaccine administration details, and view the recipient’s vaccine information.

It is important to note that to document a recipient Vaccine Administration in CVMS, the recipient **MUST BE** registered in CVMS. Registered in CVMS means the Recipient Record is found in CVMS, and the **COVID-19 Vaccine Registration** form is complete.

This set of activities can be performed by a user with a **HEALTHCARE PROVIDER, HEALTHCARE LOCATION MANAGER, or Statewide Location Manager.**

If your location enabled the scheduling feature in CVMS, please also check the [Scheduling Feature at Point of Care and Vaccine Administration](#) section of this guide.

Now, let’s get started!

Checking-in a Recipient at the Front-desk of the Point of Care


Confirm Location of Operations

(only for users associated to multiple locations)

Step 1 of 4: Verify Location for Operations

Before you begin logging checking in recipients for **VACCINE ADMINISTRATION**, you will need to verify which location you are operating from.

The current location you are operating from is displayed at the top left of the screen. If the location is correct, no further action is required.



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

You are currently logged in as TestLoc

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
------	---------	-------------	----------

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager


Tips

To learn more about getting access to other locations, speak to your location's **HEALTHCARE LOCATION MANAGER** in charge of setting up user accounts.

Step 2 of 4: Begin Switching Locations

If the location needs to be changed (e.g., you are operating in a different clinic location than the one currently displayed), continue following the instructions in this section.

- 1. Select the **SWITCH LOCATIONS** button
- 2. A pop-up window will appear asking you to select the location you would like to be operating in



Home Recipient Appointments **Locations** Bulk Registration Vaccine Inventory Vaccine Marketplace Shipments More ▾

You are currently logged in as TestLoc

Switch Locations

Recipient Check

You can check in a recipient by entering

Appointment Confirmation Number

No Appointment Confirmation Number

Search Appointments

Appointment Walk-In

Select the location to proceed:

Location Name ▾	Street ▾	City ▾	State ▾	Country ▾	Postal Code ▾
<input type="radio"/> TestLoc	333 aut	townsville	North Carolina	USA	00220
<input type="radio"/> Training Team Vaccine Provider - Site 1	1332 Turner Woods Drive				
<input type="radio"/> Training Team Vaccine Provider - Site 2	1332 Turner Woods Drive				

Submit Close

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Step 3 of 4: Submit New Location To Operate In

- 1. Select the location that you would like to operate in
- 2. Verify that the address matches the desired location
- 3. Click **SUBMIT**

Select the location to proceed:

Location Name	Street	City	State	Country	Postal Code
<input type="radio"/> TestLoc	333 aut	townsville	North Carolina	USA	00220
<input checked="" type="radio"/> Training Team Vaccine Provider - Site 1	1332 Turner Woods Drive				
<input type="radio"/> Training Team Vaccine Provider - Site 2	1332 Turner Woods Drive				

Submit

Close

Audience

Healthcare Provider

Healthcare Location Manager


Statewide Location Manager

Tips

To see a list of locations you have access to operate in / can search for, speak to your location's **HEALTHCARE LOCATION MANAGER** or your location's **VACCINE COORDINATOR**.

Step 4 of 4: Confirm Successful Location Switch

Verify that the location successfully switched by checking the display at the top left of the Home Tab.



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

You are currently logged in as Training Team Vaccine Provider - Site 1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
------	---------	-------------	----------


Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

**Standard Point of Care Walk-in
Appointment:
Recipient is Registered in COVID-19
Vaccine Portal**

Step 1 of 5: Navigate to the CVMS Provider Portal Home Page

From the **HOME PAGE**, you will complete a simple **SEARCH** using the **APPOINTMENT WALK-IN TOOL** on your home page before the recipient receives the COVID-19 vaccine.



[Home](#) [Recipient](#) [Appointments](#) [Help & Information](#)

You are currently logged in as Clinic Org1

[Switch Locations](#)

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

[Go](#)

No Appointment Confirmation Number?

[Search Appointments](#)

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Search Name

MM/DD/YYYY

Search Email

[Search](#)

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Apr 12, 21, 07:00 PM	Carla Newman Dose 2 Scheduled	03147476	Clinic Org1
Apr 12, 21, 09:44 AM	Walk-in/Na walk Walk-in/Na Dose 1 Scheduled	03499052	Clinic Org1
Apr 12, 21, 09:00 AM	TTest test test Dose 1 Scheduled	03498435	Clinic Org1
Apr 12, 21, 08:00 AM	PerfTestMar2101 PerfTestMar2101 Dose 1 Scheduled	03498867	Clinic Org1
Apr 12, 21, 08:00 AM	PerfTestMar2101 PerfTestMar2101 Dose 1 Scheduled	03498473	Clinic Org1

[View all](#)

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

If you have access to **multiple locations in CVMS**, be sure to look at the location you are operating in by looking at the **top left of the screen under the Tabs bar**.

If you need to change the location to match where you are operating for the day, select the **SWITCH LOCATIONS** button and choose the applicable location.

Step 2 of 5: Search for the Recipient

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Walkin Example

Date Of Birth

MM/DD/YYYY

Email

Search Email

Search

To get started, you will search for the **RECIPIENT** to help you **VERIFY IDENTITY** before creating their appointment.

- 1. Enter the recipient’s **NAME, DATE OF BIRTH** and / or **EMAIL ADDRESS** in the Appointment Walk-in Tool located on the Home Page
- 2. Only one field is required to search
- 3. Click **SEARCH**

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

To narrow your recipient search results, you can enter all search fields to help you find the recipient faster.

Note: To document a recipient Vaccine Administration in the CVMS Provider Portal, the recipient **MUST BE** registered in CVMS. Registered in CVMS means the Recipient Record is created, and the COVID-19 Registration Form is complete.

Step 3 of 5: Review Recipient's Information

After clicking search, you will see your **RECIPIENT SEARCH RESULTS** populate underneath the Appointment Walk-In Tool. You will be able to view the Recipient's **NAME, DATE OF BIRTH (DOB), EMAIL, VACCINE PRODUCT NAME** (if they have already received a dose), **VACCINE DOSE STATUS**, and **DATE OF ADMINISTRATION** (if they have already received a dose).

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Date Of Birth

MM/DD/YYYY

Email

Search

Search Results

1 records found

Name	DOB	Email	Vaccine Product Name	Vaccine Dose Status	Date of Administration
<input type="radio"/> Walkin Example	1965-12-12	wexample@mailinator.com		Registered	

Appointment Booking

Please be sure to bookmark this site: <https://uat-ncdhhs.cs33.force.com/VaccineProvider>

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

VACCINE DOSE STATUS indicates where a recipient is in their progress toward being vaccinated. Possible statuses include:

- REGISTERED
- DOSE 1 SCHEDULED
- DOSE 1 ADMINISTERED
- DOSE 1 CANCELLED
- DOSE 2 SCHEDULED
- DOSE 2 ADMINISTERED
- DOSE 2 CANCELLED
- ADDITIONAL DOSE/BOOSTER SCHEDULED
- ADDL DOSE/BOOSTER ADMINISTERED
- ADDL DOSE/ BOOSTER CANCELLED

Step 4 of 5: Create the Appointment Booking

Once you verified the recipient’s identity, you can officially **CREATE THEIR APPOINTMENT BOOKING**. This can occur for a recipient’s first dose, second dose, or an **ADDITIONAL DOSE / BOOSTER** if one is required.

- 1. In your **SEARCH RESULTS**, select the **CORRECT RECIPIENT RECORD**
- 2. Click **APPOINTMENT BOOKING** (you may also click the arrow to the right to select which specific appointment this is for – selecting a specific dose appointment will not affect which vaccine dose you may select during vaccine administration)
- 3. A message confirming the appointment booking was created will appear
- 4. Click **OK**

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Search Results

1 records found

Appointment Booking

Dose 1

Dose 2

Additional Dose/Booster


Name	DOB	Email	Vaccine Product Name	Vaccine Dose Status	Date of Administ
<input checked="" type="radio"/> Walkin Example	1965-12-12	wexample@mailinator.com		Registered	

Please be sure to bookmark this site: <https://uat-ncdhhs.cs33.force.com/VaccineProvider>

Step 5 of 5: Review the Appointment Booking

The appointment that is created will be available to you under **TODAY'S APPOINTMENTS**.

To begin the **VACCINE ADMINISTRATION** process, the recipient will require an **APPOINTMENT BOOKING** or **APPOINTMENT CONFIRMATION NUMBER** (if scheduling feature in CVMS is enabled).



Home Recipient Appointments Help & Information

You are currently logged in as Clinic Org1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Apr 12, 21, 01:11 PM	Walkin Example Dose 1 Scheduled	03499186	Clinic Org1

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Note: To know more about the **VACCINE ADMINISTRATION** process, please refer to the **Enter a Vaccine Administration Record** section of this user guide.

Exception 1: Recipient Record is not yet Created in CVMS

Step 1 of 9: Navigate to the CVMS Provider Portal Home Page

- 1. From the **HOME PAGE**, enter the recipient's name in the **APPOINTMENT WALK-IN TOOL**
- 2. If the recipient's record does not appear, this means that the recipient is either not registered or does not have a record

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Fred NewRecipient

Date Of Birth

MM/DD/YYYY

Email

Search Email

Search

No search results found or User's Eligibility is not Approved.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 10:59 AM	Test-1.4 Scenario145 Dose 1 Scheduled	00112065	Clinic ABC Loc 1
Jan 19, 21, 03:01 PM	Walkin Example Dose 1 Scheduled	00111942	Clinic ABC Loc 1

Please be sure to bookmark this site: <https://uat3-ncdhhs.cs32.force.com/VaccineProvider>

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager

Step 2 of 9: Search for the Recipient Record

To see if the recipient has a record, but is not yet registered, search for them in the **RECIPIENT** tab.

- 1. Navigate to the **RECIPIENT** tab
- 2. Enter the recipient's **NAME** (first name and last name) in the search bar, being sure to enter at least three characters to receive any results
- 3. To help narrow results, enter the recipient's **DATE OF BIRTH** or **EMAIL ADDRESS** in the appropriate field

Note: The Date of Birth field can only be used if there is a name or email address in the search bars, and cannot be used by itself

- 4. Click **SEARCH**

NCDHHS CVMS Provider Portal

Home **Recipient** Appointments Help & Information

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Full name, ex: John Smith Email, John@j.com Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

0 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Pro...	Recipient D...	Date of Adm...	Email	Inactive Rea...
------------	-------------	-----------	---------------	--------	----------------	----------------	----------------	-------	-----------------

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

A Vaccine Administration cannot be documented in CVMS if the recipient is not registered in CVMS.

Registration is complete when the **COVID-19 Vaccine Registration** form is entered into CVMS. This can occur in the **COVID-19 VACCINE PORTAL** or the **CVMS PROVIDER PORTAL**.

Step 3 of 9: Search for the Recipient Record

After clicking search, the **RECIPIENT SEARCH RESULTS** will populate in the **RECIPIENTS WITHIN CVMS** section.


If there are **NO** results in the **RECIPIENTS WITHIN CVMS** section, or the **CORRECT** recipient cannot be found, this indicates that the recipient does not have a record in CVMS, and must be created on-site.

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager



NCDHHS
CVMS Provider Portal

HomeRecipientAppointmentsHelp & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Search

Recipients within CVMS

0 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Pro...	Recipient D...	Date of Adm...	Email	Inactive Rea...
------------	-------------	-----------	---------------	--------	----------------	----------------	----------------	-------	-----------------

Step 4 of 9: Ask the recipient to answer the COVID-19 Vaccine Registration Form

OPTION 1 – Register the recipient by filling out the COVID-19 Vaccine Registration form with the recipient

1. Click the **CREATE NEW RECIPIENT** button on the **RECIPIENT** tab to bring up a pop-up form, read the questions and type the recipient's answers

OPTION 2 – Ask the recipient to answer the questions on a Paper Copy

1. Instruct the recipient to fill out a paper copy of the COVID-19 Vaccine Registration form (the PDF file is available under the **HELP & INFORMATION TAB** or on the NC Immunization Branch website at [CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19](#) labeled as **RECIPIENT REGISTRATION AND COVID-19 VACCINE ADMINISTRATION FORM** (in English and Spanish)
2. Give the recipient a few minutes to fill the form
3. Click the **CREATE NEW RECIPIENT** button on the **RECIPIENT** tab to bring up a pop-up form

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager

Tips

Print several copies of the **COVID-19 Vaccine Registration form** to keep on hand to provide recipients.

Step 5 of 9: Create the Recipient Record

Create New Recipient

* First Name

Fred

Middle Name

* Last Name

NewRecipient

Email

frednewrecipient@mailinator.com

No Email Provided

☐

* Birthdate (MM/DD/YYYY)

Dec 12, 1944

Cancel

Create Recipient

Fill in the required fields.

1. If the recipient cannot provide an email address, select the **NO EMAIL PROVIDED** checkbox. Please inform the recipient that in the absence of an email address, it will not be possible for them to connect to the COVID-19 Vaccine Portal and view their Vaccine Information PDF. You can however access the Vaccine Information PDF from the CVMS Provider Portal and print it for them if needed
2. Enter **BIRTHDATE**
3. Select **CREATE RECIPIENT**

Note: A recipient’s first and last name must contain at least 2 characters. If you try to enter a patient’s name with less than 2 characters, the system will raise a validation error. This error may be bypassed if the recipient’s name is less than two characters.

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Step 6 of 9: Begin the recipient's COVID-19 Vaccine Registration

Once the recipient is created, a new browser tab will open for you to fill out the recipient's **COVID-19 Vaccine Registration** form using the paper copy the recipient filled out.


- 1. Review the information statement
- 2. Click **NEXT**

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager



[Home](#) [Recipient](#) [Appointments](#) [Help & Information](#)

Vaccine Registration for: Fred NewRecipient

Introduction

Contact and Demographic Detail

Confirmation

COVID-19 Vaccination Registration

Please complete the registration form for COVID-19 vaccination, which should take less than 5 minutes to complete.

Information about your COVID-19 vaccination is carefully managed to protect your privacy. Your immunization information will not be shared except in accordance with state and federal law. NC CVMS is a system that enables the collection of immunization information for health and safety reasons. The immunization information collected for NC CVMS is similar to the information that is required when you go to the doctor's office or a pharmacy for a vaccination, including your name, address, date of birth, location where vaccine was given, when the vaccine was given, person who administered the vaccine, information about the specific vaccine vial (expiration date, vaccine identifier number, etc.) and how the vaccine was given (e.g., in the muscle of the right arm). NC CVMS also collects information about race and ethnicity, which is necessary to support efforts for equitable vaccine distribution in NC. To meet federal requirements established by the U.S. Centers for Disease Control and Prevention (CDC) and in accordance with NC state law, NC does not submit any identifiable information to CDC. Instead of the CDC requested identifying information, NC is currently submitting the vaccine recipient's year of birth (not date of birth), the first 3 digits of the vaccine recipient's zip code of residence (if the underlying population in that zip code includes more than 20,000 people) and the date of submission of the vaccination record. More information about federal CDC data requirements is available at: <https://www.cdc.gov/vaccines/covid-19/reporting/requirements/index.html>

Next

Step 7 of 9: Enter the Recipient's Demographic Information and Vaccine Group

- 1. Enter the recipient's demographic information, contact information, language, and disability as entered by the recipient on **COVID-19 Vaccine Registration form**
- 2. Click **NEXT**

Vaccine Registration for: Fred NewRecipient

Introduction

Contact and Demographic Detail

Confirmation

Please provide the information below. Items with a * are required.

* First Name

Fred

Middle Name

* Last Name

NewRecipient

* Address Line 1

Address Line 2

* City

* County

--None--

* State

--None--

* Zip Code

Email (Will allow you to access your vaccine information in the COVID-19 Vaccine Portal.)

frednewrecipient@mailinator.com

Home Phone

Mobile Phone

* The best way to contact you

--None--

* Date of Birth (MM/DD/YYYY)

Dec 12, 1944

* Race

--None--

* Ethnicity

--None--

* Gender

--None--

Preferred Language

--None--

*Providing a Language preference will not provide translated text/communication, except Spanish.

Please check all disabilities that apply to you:

☒ Not Disabled

☐ Cancer

☐ Cognitive (Psychological or Psychiatric)

☐ Neurological

☐ Physical (Mobility)

☐ Respiratory

☐ Sensory (Vision or Hearing)

☐ Other (Please Specify)

Next

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager

Tips

We strongly encourage recipients to provide a valid email address as it will give them access to the COVID-19 Vaccine Portal, from where they can download their Vaccine Information PDF.

If a recipient lives in an apartment or suite, use the optional **ADDRESS LINE 2** field.

Step 8 of 9: Submit the Recipient's Information

Review the information you entered from the paper copy of the **COVID-19 Vaccine Registration form**.

- 1. Validate that the information entered matches the information given by the recipient
- 2. To make changes, select **PREVIOUS**
- 3. If the information is correct, select **SUBMIT**

NCDHHS
CVMS Provider Portal

Home Recipient Appointments Help & Information

Vaccine Registration for: Fred NewRecipient

Introduction Contact and Demographic Detail Confirmation

[Confirm and submit to enroll](#)

Please review the information below and confirm that it is correct. Click submit to complete your registration.

Background Information

First Name Fred
Middle Name
Last Name NewRecipient
Address 123 Main Street
City Raleigh
County Wake
State North Carolina
Zip Code 12345
Country: United States
Email frednewrecipient@mailinator.com
Home Phone
Mobile Phone
The best way to contact you None
Date of Birth (MM/DD/YYYY) 12/12/1944
Race White
Ethnicity Not Hispanic or Latino
Gender Male

Preferred Language English
Disability Neurological | Respiratory | Sensory (Vision or Hearing)

[Previous](#) [Submit](#)

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager

Tips

If you have any questions about what a recipient wrote on a paper registration form, ask them for clarification before submitting.

Step 9 of 9: Verify the Recipient's Registration

- 1. The **REGISTRATION IS COMPLETE**
- 2. The recipient's **RECIPIENT DOSE STATUS** is updated to **REGISTERED** and is visible on the Recipient tab

Home

Recipient

Appointments

Help & Information

Vaccine Registration for: Fred NewRecipient

Introduction

Contact and Demographic Detail

Confirmation

Your registration is complete

Thank you for completing the registration process. Please remember that registration does not mean that you are currently eligible to be vaccinated or that you have an appointment. A free COVID-19 vaccine will be available to all who want it, but supplies are currently limited. Get accurate information about COVID-19 vaccines at [YourSpotYourShot.NC.Gov](#).

Home

Recipient

Appointments

Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Q Fred NewRecipient

Q Email , John@j.com

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

1 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Produ...	Recipient Dose...	Date of Admini...	Email	Inactive Reason
Fred		NewRecipient	Dec 12, 1944	Male		Registered		frednewrecipient@...	

Audience

Healthcare Provider

Healthcare Location Manager


Statewide Location Manager

Tips

If the recipient informs you that their health information is **NOT CORRECT**, ask the recipient to **UPDATE** their information (e.g., responses to COVID-19 Vaccine Registration form) in the **COVID-19 VACCINE PORTAL** or you can directly edit the registration information in the CVMS Provider Portal.

Finalize Walk-In Appointment Booking

Now that the recipient has been registered successfully, you can return to the **HOME** page and follow the Standard **APPOINTMENT WALK-IN** Booking process.



[Home](#) [Recipient](#) [Appointments](#) [Slot Management](#) [Help & Information](#)

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 09, 21, 05:01 AM	Test Tall Recipient-1 Dose 1 Scheduled	03045743	Clinic Location1
Mar 09, 21, 01:17 PM	Test6 NC EHR Dose 1 Scheduled	03045771	Clinic Location1
Mar 09, 21, 01:25 PM	Test7 NC EHR Dose 2 Scheduled	03045775	Clinic Location1

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Space Test

Date Of Birth

MM/DD/YYYY

Email

Search Email

Search

Search Results

Appointment Booking

Name	DOB	Email	Vaccine Group:	Vaccine Dose Status
<input type="radio"/> Space t Test	1997-03-17	rohiniuat@mailinator.com	Group 4	Dose 1 Scheduled

Please be sure to bookmark this site: <https://uat-ncdhhs.cs33.force.com/VaccineProvider>

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager

Documenting a Vaccine Administration

Enter Vaccine Administration Record

Step 1 of 10: Begin Vaccine Administration

There are three methods to begin the **VACCINE ADMINISTRATION** process.

When a **RECIPIENT** walks in to receive their COVID-19 vaccine and they do not have a scheduled appointment, the provider who initially verifies their identity will create an Appointment Booking for the recipient.

The provider who will administer the COVID-19 vaccine will select the recipient under **TODAY'S APPOINTMENTS** on the **HOME PAGE** which will begin the **VACCINE ADMINISTRATION** process.

Audience


Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager

Tips

To review how to check-in a recipient through the Appointment Walk-In tool, review the **Booking Walk-In Appointments** section of this User Guide.



HomeRecipientAppointmentsHelp & Information

You are currently logged in as Clinic Org1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Apr 15, 21, 09:39 AM	VaccineAdmin Test Dose 1 Scheduled	03530452	Clinic Org1
Apr 15, 21, 07:10 AM	aaaa aaaaaa aaaaaa Dose 2 Scheduled	03530435	Clinic Org1
Apr 15, 21, 07:08 AM	AA BB CC Dose 2 Scheduled	03530433	Clinic Org1
Apr 15, 21, 07:01 AM	Sanjana Joy Dose 2 Scheduled	03530432	Clinic Org1
Apr 15, 21, 07:00 AM	Mod Man Dose 2 Scheduled	03530430	Clinic Org1

View all


Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Step 2 of 10: Begin Vaccine Administration

Alternatively, if you are a provider that has signed up for the scheduling feature in CVMS, you can begin the **VACCINE ADMINISTRATION PROCESS** by entering the recipient's **APPOINTMENT CONFIRMATION NUMBER** that they received after scheduling their appointment online using the scheduling feature in CVMS.

- 1. Enter the **APPOINTMENT CONFIRMATION NUMBER** for the recipient
- 2. Click **GO**



[Home](#) [Recipient](#) [Appointments](#) [Help & Information](#)

You are currently logged in as Clinic Org1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Apr 15, 21, 09:39 AM	VaccineAdmin Test Dose 1 Scheduled	03530452	Clinic Org1
Apr 15, 21, 07:10 AM	aaaa aaaaaa aaaaaa Dose 2 Scheduled	03530435	Clinic Org1
Apr 15, 21, 07:08 AM	AA BB CC Dose 2 Scheduled	03530433	Clinic Org1
Apr 15, 21, 07:01 AM	Sanjana Joy Dose 2 Scheduled	03530432	Clinic Org1
Apr 15, 21, 07:00 AM	Mod Man Dose 2 Scheduled	03530430	Clinic Org1

View all

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager

Tips

For information on how to enable the scheduling feature in CVMS, please refer to the **Step 10 – Invite Recipients to Self-Schedule Their Appointments User Guide** at [CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19](#).

Step 3 of 10: Begin Vaccine Administration

Lastly, for those providers with access to the scheduling feature in CVMS, the **VACCINE ADMINISTRATION** process can also begin from the **APPOINTMENTS TAB**.

- 1. Navigate to the **APPOINTMENTS TAB**
- 2. Find the **CORRECT APPOINTMENT BOOKING** for the recipient you would like to begin the Vaccine Administration for
- 3. Click the drop-down arrow to the right of their name
- 4. Select **CHECK IN** to begin **VACCINE ADMINISTRATION**

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager

Home

Recipient

Appointments

Help & Information

You are currently logged in as County General Hospital - Chicago ER

Appointments

All Appointments

20 items

Cancel Appointment

Search Appointments

Search Confirmation Number

From

To

Status

Search by Name, Location, Vaccine Status

2021-03-09

New

Search

Reset

<input type="checkbox"/>	Case	Confirmation...	Date	Time	Recipient Na...	DOB	Location	Vaccine Status	Status
<input type="checkbox"/>	03113939	gcdspjfp9n.1	Mar 9, 2021	8:00:00 AM	Wonder Woman	1940-05-05	County General H...	Dose 1 Scheduled	New
<input type="checkbox"/>	03113941	k6nxju95p.1	Mar 9, 2021	9:00:00 AM	NWW	1980-01-01	County General H...	Dose 1 Scheduled	New
<input type="checkbox"/>	03113973	njt65uisi7.1	Mar 9, 2021	12:00:00 PM	Thomas Reece Fl...	1991-03-10	County General H...	Dose 1 Scheduled	New

Step 4 of 10: Receive Verbal Consent

Beginning the **VACCINE ADMINISTRATION** process takes you to the **PATIENT VERIFICATION & SCREENING** page.

- 1. Review the recipient’s health information on the right-hand side of the screen and click **NEXT**
- 2. On the **VACCINE CONSENT AND MEDICAL HISTORY** page, read the **DISCLOSURE STATEMENT** to the recipient
- 3. After you **RECEIVE VERBAL CONSENT**, you can **CHECK** the check box indicating that consent was provided and click **NEXT**

*Note: The recipient’s **MEDICAL HISTORY** will be displayed on the right-hand side of the screen throughout the entire Vaccine Administration Process.*

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

<

Step 5 of 10: Provide the Vaccine Information Sheet / EUA Fact Sheet

Before you administer the COVID-19 vaccine, you must also **PROVIDE** the **VACCINE INFORMATION SHEET OR EMERGENCY USE AUTHORIZATION (EUA) FACT SHEET** and the **V-SAFE INFORMATION SHEET** to the recipient or guardian.

1. Obtain copies of the Vaccine Information Sheet / EUA Fact Sheet at this website
 - a. Pfizer (Vaccine Information Fact Sheet): <https://www.fda.gov/media/144414/download>
 - b. Moderna (EUA Fact Sheet): <https://www.fda.gov/media/144638/download>
 - c. Janssen (EUA Fact Sheet): <https://www.fda.gov/media/146305/download>
2. Obtain copies of the V-safe Information Sheet at this website:
https://immunize.nc.gov/providers/ncip/pdf/v_safe_poster_508.pdf
3. Provide the recipient or guardian with the Vaccine Information / EUA Fact Sheet prior to vaccination.
4. Ask the recipient if they have any questions about the risks and benefits of receiving the COVID-19 vaccine.
5. Counsel the recipient on the importance of enrolling in V-safe to report any adverse events following vaccination.

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager

Step 6 of 10: Review the Vaccine Administration Details

Once you receive the recipient's consent and provide them with the appropriate Vaccine Information Sheet / EUA Fact Sheet, you will continue to the **VACCINE ADMINISTRATION** page. This page is where you will **CAPTURE KEY INFORMATION** about the **COVID-19 VACCINE ADMINISTERED**.

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CVMS Provider Portal

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Vaccine Administration

Vaccination Log

Dose Details ▾

Date & Time ▾

Administered By ▾

On Behalf Of (Cli... ▾

Location ▾

Vaccine Inventory ▾

Vaccine Product ▾

Lot Number ▾

Vaccination Details

* Injection Site

--Select Injection Site-- ▴▾

Dose 1Dose 2Additional Dose/Booster

* Route

☐ Intramuscular (IM) ☐ Subcutaneous (SQ) ☐ Intradermal (ID)

* Date and Time of Vaccination

DateTime

Sep 7, 2021📅1:41 PM⌚

Medical History

Joey Recipient
DOB: Jan 1, 1955
Age: 66

Gender

Male

Race

White

Ethnicity

Not Hispanic or Latino

Address

123 Main St
Raleigh, North Carolina 11111

* Available Vaccine Inventory

-- Select Vaccine Inventory -- ▴▾

Lot Number

Serial Number

NDC

Expiration Date

Notes

Enter notes here

PreviousNext

Raleigh, North Carolina 11111

Wake

Email Address

Phone Number

Preferred Communication Channel

None

NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

Audience

**Healthcare
Provider**

Healthcare Location Manager

Statewide Location Manager

Step 7 of 10: Vaccine Administration Details for the Second Vaccine Dose

NCDHHS

CVMS Provider Portal

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Register

Schedule First Dose Appointment

Schedule Second Dose Appointment

Birthdate

Gender

Mobile

Email

Recipient Dose Status

12/2/1987

Male

Additional Dose/Booster Administered

Details

Related

You can view the full details of each vaccine administration by clicking on a single Vaccination Log Name hyperlink or click "View All" for all history.

Vaccination Logs (1)

VL-009989658

Date and Time of Vaccination:

Vaccine Status:

Vaccine:

12/3/2021, 12:00 AM

Additional Dose/Booster Administered

Pfizer-BioNTech (age 12+) (6 doses/vial) (195 MDV) COVID-19 Vaccine

View All

If your recipient has already **RECEIVED A DOSE** of the COVID-19 vaccine through a CVMS Provider, you will see a summary of the dose details in the **VACCINATION LOG** at the top of the **VACCINE ADMINISTRATION PAGE**.

Dose Details will include:

- Dosage (1st, 2nd, Additional)
- Date and Time
- Administered By
- On Behalf Of (Clinician)
- Location
- Vaccine Inventory
- Vaccine Product
- Lot Number

If a recipient received a dose from a provider other than a CVMS provider or Federal Pharmacy Partner (e.g., out of state, through the Department of Veterans Affairs), the dose will not appear in the **VACCINATION LOG**. You may still mark the administration as a **SECOND or ADDITIONAL DOSE / BOOSTER**. In that instance, a warning label will appear at the top of the screen prompting you to verify the selection.

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

- Verify if a prior dose was given to the recipient.
- Selecting **SECOND DOSE** will put the recipient into **DOSE 2 ADMINISTERED** status.
- Selecting **ADDITIONAL DOSE / BOOSTER** will put the recipient into **ADDITIONAL DOSE / BOOSTER ADMINISTERED** status.

Warning

Please verify the recipient has received their first dose before choosing Second Dose.

NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

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Step 8 of 10: Enter Vaccine Administration Details

Vaccination Details

* Injection Site

--Select Injection Site--

Dose 1

Dose 2

Additional Dose/Booster

* Route

☐ Intramuscular (IM)

☐ Subcutaneous (SQ)

☐ Intradermal (ID)

* Date and Time of Vaccination

Date

Time

Sep 7, 2021

1:41 PM

On Behalf of (Clinician)

-- Select Vaccine Administrator --

On the **VACCINE ADMINISTRATION** page, you will capture all **VACCINE DETAILS**.

- Populate all **REQUIRED** vaccination details

1. Injection Site
2. Dose (See [ENTER AN ADDITIONAL DOSE / BOOSTER ADMINISTRATION](#) section for further considerations)
3. Route
4. Date & Time of Vaccination (This field will default to the current date and time, but can be edited to record a vaccine administered in the past)

Note: The field **ON BEHALF OF (CLINICIAN)** allows you to enter information on behalf of another clinician who administered the COVID-19 vaccine.

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

Use the drop-down for the **ON BEHALF OF (CLINICIAN)** field and type the first letter of the clinician’s name.

If the individual completing the form is the person who administered the vaccine, **DO NOT ENTER** anything in the **ON BEHALF OF (CLINICIAN)** field.

Step 9 of 10: Enter Vaccine Administration Details

* Vaccine Product

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

* Manufacturer

Pfizer-BioNtech

* Available Vaccine Inventory

Expiration 1/13/2021 8:30 (Exp. Date: 1/13/2021) (Lot No: 100)

Lot Number

100

Serial Number

100

NDC

59267-1000-02

Expiration Date

Jan 13, 2021

Notes

No notes to report.

Previous

- Continue populating all **REQUIRED** vaccination details
 - Vaccine Product (Vaccine Type)
 - Available Vaccine Inventory (what lot?)

Note: If you select a **SINGLE-DOSE** vaccine product, you must select **FIRST DOSE**, otherwise you will receive an error.

- Enter any additional notes that are relevant in the **NOTES** text field
- REVIEW ALL VACCINE DETAILS**
- Click **NEXT**

*If you are administering a second dose or additional dose of COVID-19 vaccine, please be sure to confirm the COVID-19 vaccine is from the **SAME MANUFACTURER** as the first COVID-19 vaccine dose.*

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

MANUFACTURER, LOT NUMBER, SERIAL NUMBER, NDC NUMBER and **EXPIRATION DATE** will **AUTO POPULATE** once you select the Product and Available Vaccine Inventory.

Step 10 of 10: Finish an Appointment

If you have administered a **SINGLE-DOSE** product of this is a second dose appointment, you will be routed back to the **HOME PAGE**.

If you have administered the first dose of a **TWO-DOSE** product, you will be routed to the **SCHEDULE FOLLOW-UP** page. This page will remind you to tell the recipient to schedule their second dose appointment. You can click **FINISH APPOINTMENT** to close the appointment and bring up the **HOME PAGE**.

*If the recipient used the scheduling feature in CVMS to book their first appointment, you will see a button labeled **BOOK SECOND DOSE** on this page. See the **SCHEDULE A SECOND DOSE APPOINTMENT** section for more details on that process.*

Audience

Healthcare
Provider

Healthcare
Location
Manager

Schedule Follow Up

Second Dose Disclaimer

The COVID-19 vaccine requires a booster dose 21 days after your initial dose.

Schedule Follow Up

Second Dose Disclaimer

The COVID-19 vaccine requires a booster dose 21 days after your initial dose.

Schedule Second Dose Appointment

Schedule second dose appointment for confirmation number: r5r9naxiek.

Book Second Dose

Medical History

Wonder Woman

DOB: May 5, 1940

Age: 80

Gender

Other

Race

Other

Ethnicity


Unknown

Edit Vaccine Administration Details

Step 1 of 8: Navigate to Appointments Tab

If a **RECIPIENT** has incorrect details entered during Vaccine Administration, the Healthcare Provider must **EDIT** the details to ensure data accuracy.

To begin, navigate to the **APPOINTMENTS** tab.



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You are currently logged in as Solutions Loc1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
------	---------	-------------	----------

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

Healthcare Providers can only update Vaccine Administration details for recipients who received their COVID-19 vaccine through the same location as the Healthcare Provider.

Clicking on the Appointments tab takes you to a list view of all Appointments for your location. Verify that you are currently logged in to the same location that the recipient received their vaccine.



Healthcare Location Manager

Statewide Location Manager

The **APPOINTMENTS** tab will default to show you appointments that were scheduled for the same day you are logged in.

Step 3 of 8: Select Appointment to be Updated

To begin editing the details of the **VACCINE ADMINISTRATION**, you must first locate the correct **APPOINTMENT RECORD**.

- 1. Enter the name of the recipient in the Search field, and adjust the date range to capture the date of the appointment that needs updating
- 2. Click **SEARCH**
- 3. Click the **CORRECT APPOINTMENT RECORD** for the recipient. The correct record will be the one that shows a **VACCINE STATUS** as either **DOSE 1 (or 2) ADMINISTERED** or **ADDITIONAL DOSE / BOOSTER ADMINISTERED**

Audience


Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager

Tips

Alternatively, you may search for the recipient via the **RECIPIENT TAB**, locate their recipient record, and click on their Appointment record.



NCDHHS
CVMS Provider Portal

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You are currently logged in as Solutions Loc1

Appointments

All Appointments

1 items

Search Appointments

Vaccine AdminTest

Search Case/Confirmation Number

Search By From Date

2021-07-09

Search By To Date

Search By Status

None

Search

Reset

1 records found.

<input type="checkbox"/>	Case	Confirmati...	Date	Time	Recipient ...	DOB	Location	Cancellatio...	Vaccine Sta...	Status
<input type="checkbox"/>	03045296		Jul 21, 2021	1:17:27 PM	Vaccine AdminT...	1955-05-22			Dose 1 Adminis...	Closed

Previous

Page 1 out of 1

Next

Step 4 of 8: Review Vaccine Administration Details

The **VACCINE ADMINISTRATION** details will display for the recipient.

1. All Vaccination details are visible including:

- Date and Time
- Vaccine Product / Inventory
- Injection Site
- Route
- Administered By
- On Behalf of (Clinician)
- Notes

2. To begin editing the details of the **VACCINE ADMINISTRATION**, select any **PENCIL ICON** to the right of a field

NCDHHS CVMS Provider Portal

Home Recipient Appointments Locations Bulk Registration Vaccine Inventory Vaccine Marketplace Shipments More

Remove this Administration Change Vaccine Inventory Change Recipient

DETAILS RELATED

Case Number 03045296	Vaccine Status Dose 1 Administered
Account Name Solutions Loc1	Vaccine Moderna (10 MDV) COVID-19 Vaccine
Name Vaccine AdminTest	Vaccine Inventory 444444 Delivery 07/08/2021
Appointment DateTime 7/21/2021, 1:17 PM	Lot # 444444
Date and Time of Vaccination 7/21/2021, 1:17 PM	Vaccine Dosage First Dose
Adverse Reaction Consent <input checked="" type="checkbox"/>	Injection Site Left Deltoid
Schedule Dose2 Followup Email <input type="checkbox"/>	Route Intramuscular (IM)
Cancellation Reason	Administered By Steve Digangi
Cancellation Description	On Behalf of (Clinician)
Cancelled by System via Batch Job <input type="checkbox"/>	
State Sponsored Contract <input type="checkbox"/>	
Additional Vendor Type (SSCI)	

Additional Information

Status Closed	Notes
Date/Time Opened 7/21/2021, 1:17 PM	Date/Time Closed 7/21/2021, 1:18 PM
Created By Steve Digangi , 7/21/2021, 1:17 PM	Last Modified By Steve Digangi , 7/21/2021, 1:18 PM
Case Origin	Priority Medium
Contact Name Vaccine AdminTest	Case Owner CVMS Default Case Owner

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager

Step 5 of 8: Edit Vaccine Administration Details

The **VACCINE ADMINISTRATION** details will now appear as editable fields. As you edit fields, they will highlight yellow to indicate that you've made a change.

1. Edit any of the following fields to the correct information:

- Date / Time of Vaccination
- Injection Site
- Route
- Administered By
- On Behalf of (Clinician)
- Notes

2. Do not edit any of the following fields:

- Account Name
- Cancellation Reason
- Appointment Date / Time
- Case Owner

3. Click **SAVE**

The screenshot shows a web form for editing vaccine administration details. Key fields include Case Number (03045296), Account Name (Solutions Loc1), Name (Vaccine AdminTest), Appointment Date/Time (7/21/2021, 1:17 PM), Date and Time of Vaccination (7/21/2021, 1:17 PM), Adverse Reaction Consent (checked), Schedule Dose2 Followup Email (unchecked), Cancellation Reason (--None--), Cancellation Description, Cancelled by System via Batch Job (unchecked), State Sponsored Contract (unchecked), and Additional Vendor Type (SSC). Vaccine details include Vaccine Status (Dose 1 Administered), Vaccine (Moderna (10 MDV) COVID-19 Vaccine), Vaccine Inventory (444444 Delivery 07/08/2021), Lot # (444444), Vaccine Dosage (First Dose), Injection Site (Right Deltoid), and Route (Subcutaneous (SQ)). The Administered By field is set to Steve Digangi. The On Behalf of (Clinician) field has a search bar. A red box highlights the Injection Site and Route dropdowns, and another red box highlights the Save button.

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager


Tips

From this screen, you cannot edit the **VACCINE INVENTORY**. To see how to edit Vaccine Inventory, look at the next slide.

NOTE: You cannot remove Dosage, Injection Site, or Route, nor can you uncheck the Adverse Reaction Consent checkbox on administered appointments. If you need to remove a vaccine administration, see the Remove Vaccine Administration section of this user guide.

Step 6 of 8: Change Vaccine Inventory

To edit the **VACCINE INVENTORY** field of the **VACCINE ADMINISTRATION**, you must select the **CHANGE VACCINE INVENTORY** button.



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Remove this Administration

Change Vaccine Inventory

Change Recipient

DETAILS

RELATED

Case Number

03045296

Account Name

Solutions Loc1

Name

Vaccine AdminTest

Appointment DateTime

7/21/2021, 1:17 PM

Date and Time of Vaccination

7/21/2021, 1:17 PM

Adverse Reaction Consent

☒

Vaccine Status

Dose 1 Administered

Vaccine

Moderna (10 MDV) COVID-19 Vaccine

Vaccine Inventory

444444 Delivery 07/08/2021

Lot #

444444

Vaccine Dosage

First Dose

Injection Site

Right Deltoid

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

Review the next section of this User Guide for instructions on how to use the **CHANGE RECIPIENT** button.

Step 7 of 8: Select an Updated Vaccine Inventory

A pop-up window will appear inviting you to Change Vaccine Inventory.

- 1. Click the **SEARCH VACCINE INVENTORIES** field, which will populate a list of available inventories for your location
- 2. Locate and click the correct inventory, or type the name of the inventory to quickly find it

Note: You cannot change the Vaccine Inventory from a two-dose vaccine product to a single-dose vaccine product if you are editing a **SECOND DOSE** vaccine administration

- 3. Click **FINISH**

Change Vaccine Inventory

Existing Vaccine Inventory:
444444 Delivery 07/08/2021

Updated Vaccine Inventory Name:

Lot 123 - Delivery 02/19/2021

x

Case Number:

Account Name:

Contact Name:

Vaccine AdminTest

Solutions Loc1

Appointment Date/Time:

Jul 21, 2021, 1:17:27 PM

Cancel

Finish

Updated Vaccine Inventory Name:

Search Vaccine Inventories...

Lot 123 - Delivery 02/19/2021
123 • Pfizer-BioNTech (6 doses/vial) (195 MDV) COVID-19 Vaccine • Solutions Loc1

Lot 432 Delivery 02/26/2021
Lot 432 • Moderna (10 MDV) COVID-19 Vaccine • Solutions Loc1

Lot 9990999 Delivery 03/17/2021 2st dose
Lot 9990999 • Moderna (10 MDV) COVID-19 Vaccine • Solutions Loc1

Audience

Healthcare
Provider


Healthcare
Location
Manager

Statewide
Location
Manager

Tips

Although **VACCINE PRODUCT** is not an editable field, changing the **VACCINE INVENTORY** to an inventory of a different product will automatically update the **VACCINE PRODUCT** field.

Step 8 of 8: Review the Vaccine Administration Details Change History





[Home](#)[Recipient](#)[Appointments](#)[Locations](#)[Bulk Registration](#)[Vaccine Inven](#)

Remove

DETAILS

RELATED

 Related Cases (0)

 Case History (6+)

Date	Field	User	Original Value	New Value	
7/22/2021, 9:34 ...	Injection Site	Steve Digangi	Left Deltoid	Right Deltoid	▼
7/22/2021, 9:34 ...	Route	Steve Digangi	Intramuscular (IM)	Subcutaneous (SQ)	▼
7/21/2021, 1:18 ...	Vaccine Inventory	Steve Digangi		444444 Delivery 0...	▼
7/21/2021, 1:18 ...	Status	Steve Digangi	New	Closed	▼
7/21/2021, 1:18 ...	Appointment Date...	Steve Digangi	7/21/2021, 1:17 PM	7/21/2021, 1:17 PM	▼
7/21/2021, 1:18 ...	Date and Time of V...	Steve Digangi		7/21/2021, 1:17 PM	▼

View All

At any point, you can review the history of changes made to the Vaccine Administration details.

- 1. From the Appointment Record, click the **RELATED** tab
- 2. View **CASE HISTORY** to see the date, time, user, old value, and new value for each individual field that was changed

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Post-Vaccine Administration Reminders

Post Vaccine Administration Reminders

After recipients received a first dose, they will receive **TWO (2) SECOND DOSAGE REMINDER NOTIFICATIONS** of the timing requirements for the second dosage:

- 1. The first reminder is **24 HOURS** after
- 2. The second is **ONE WEEK AFTER** the first dosage is administered.

Booster dose notifications are also sent to recipients, older than 15 years old, 2 weeks before they become eligible. Notifications are sent by email, text message, or both depending on the choices the recipient made at registration.

Note: Second dosage reminder notifications are only sent to recipients who have set their preferred method of contact to text, email, or both, regardless of whether the recipient is a minor.

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager

Booster Dose Notifications Sent By Email

Moderna

YOU HAVE A
SPOT. | TAKE YOUR
SHOT.



Anyone 18 and older who received the Moderna COVID-19 vaccination can now receive a booster vaccination at least 6 months after [receiving their second dose](#).

The Moderna booster is a smaller dose than what is given in the first two shots. Be sure to let your provider know you want the booster.

Booster shots strengthen and extend protection against infection, severe illness, hospitalization and death from COVID-19. They are a part of the COVID-19 vaccination effort that has saved thousands of lives with tested, safe and effective vaccines.

Booster vaccinations are now available to all North Carolinians 18 and older. Go to [MySpot.nc.gov/booster-m](https://myspot.nc.gov/booster-m) to find out more about the COVID-19 boosters and to find a vaccine location near you. You do not need to get your booster dose at the same location you received prior doses. Your vaccine provider will ask questions about your previous COVID-19 vaccinations to make sure you get the right booster at the right time. Please have your vaccine information with you. Need a copy of your vaccine information? [Learn more](#) or call 888-675-4567.

Mandy Cohen, MD, MPH

Secretary, NC Department of Health and Human Services



J&J

YOU HAVE A
SPOT. | TAKE YOUR
SHOT.



The Food and Drug Administration (FDA) has authorized and the Centers for Disease Control and Prevention (CDC) now recommends that individuals can receive a COVID-19 booster vaccination of their Johnson & Johnson vaccine 2 months following their initial dose.

Additionally, individuals are now able to receive any brand of COVID-19 vaccine for their booster shot. Some people may have a preference for the vaccine type that they originally received and others may prefer to get a different booster. Limited preliminary evidence suggests that booster doses of one of the two mRNA vaccines—Moderna or Pfizer-BioNTech—more effectively raise antibody levels than a booster dose of the Johnson & Johnson vaccine. NC DHHS encourages you to speak with a doctor, nurse or pharmacist if you have questions about what booster is right for you.

Booster shots strengthen and extend protection against infection, severe illness, hospitalization and death from COVID-19. They are a part of the COVID-19 vaccination effort that has saved thousands of lives with tested, safe and effective vaccines.

Go to <https://myspot.nc.gov/booster-j> to find out more about the COVID-19 boosters and to find a vaccine location near you.

You do not need to get your booster dose at the same location you received prior doses. Your vaccine provider will ask questions about your previous COVID-19 vaccinations to make sure you get the right booster at the right time. Please have your vaccine information with you.

Mandy Cohen, MD, MPH

Secretary, NC Department of Health and Human Services



Pfizer

YOU HAVE A
SPOT. | TAKE YOUR
SHOT.



Anyone 18 and older who received the Pfizer COVID-19 vaccination can now receive a booster vaccination at least 6 months after [receiving their second dose](#).

Booster shots strengthen and extend protection against infection, severe illness, hospitalization and death from COVID-19. They are a part of the COVID-19 vaccination effort that has saved thousands of lives with tested, safe and effective vaccines.

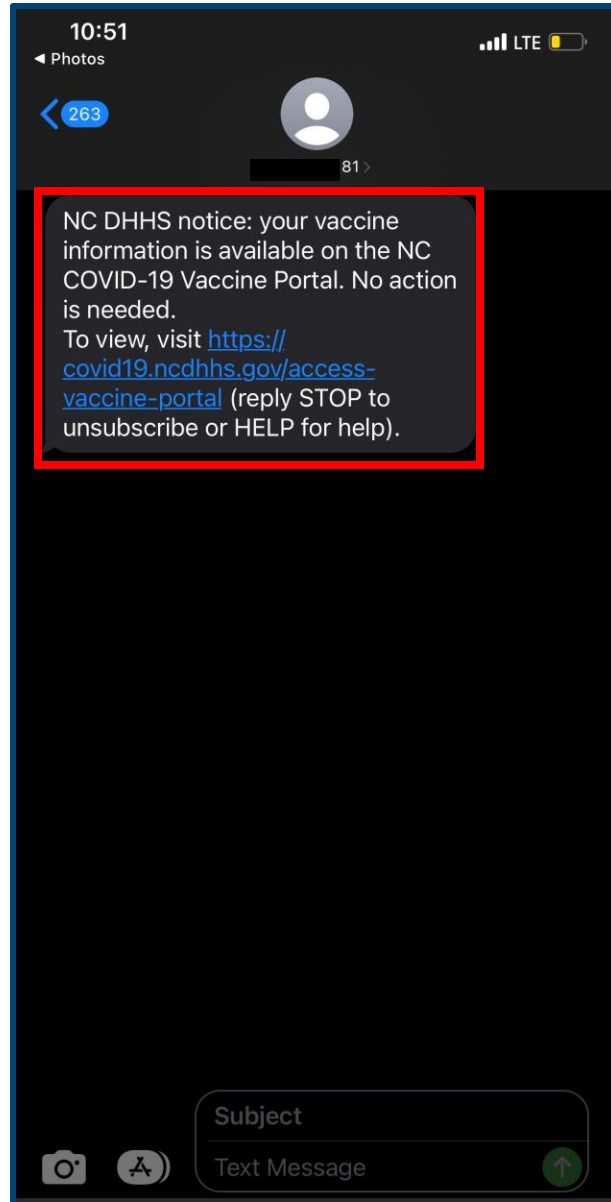
Booster vaccinations are now available to all North Carolinians 18 and older. Go to [MySpot.nc.gov/booster](https://myspot.nc.gov/booster) to find out more about the COVID-19 boosters and to find a vaccine location near you. You do not need to get your booster dose at the same location you received prior doses. Your vaccine provider will ask questions about your previous COVID-19 vaccinations to make sure you get the right booster at the right time. Please have your vaccine information with you. Need a copy of your vaccine information? [Learn more](#) or call 888-675-4567.

Mandy Cohen, MD, MPH

Secretary, NC Department of Health and Human Services



Booster Notifications Sent by Text Message



Generating the Vaccination Information PDF for a Recipient

Step 1 of 2: Search for the Recipient

- 1. Click the **RECIPIENT TAB**
- 2. Type your **RECIPIENT'S NAME** in the **SEARCH BAR** and **PRESS ENTER**
- 3. Click your **RECIPIENT'S NAME** from the list to open the recipient's account

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager

Home

Recipient

Appointments

Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Q Nicholas

Q Email, John@j.com

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

15 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Produc...	Recipient Dose ...	Date of Admini...	Email	Inactive Reason
Nicholas	Iner	TestUAT	Feb 24, 1989	Male	Moderna (10 MDV) ...	Dose 2 Canceled	Mar 12, 2021, 01:1...	niengebretson@gm...	
Nicholas	Iner	MustHaveComms	Feb 24, 1989	Male	Moderna (10 MDV) ...	Dose 2 Administered	Mar 15, 2021, 02:3...	n.i.engebretson@ac...	
Ray		Nicholas	Apr 18, 1977	Female		Registered		abelluat12+y99@g...	
Nicholas-05		ZZTest	Aug 9, 1988	Male	Pfizer-BioNTech (5 ...	Dose 2 Administered	Mar 7, 2021, 12:00...		
Nicholas-04		ZZTest	Aug 9, 1988	Male	Pfizer-BioNTech (5 ...	Dose 2 Administered	Mar 7, 2021, 12:00...		

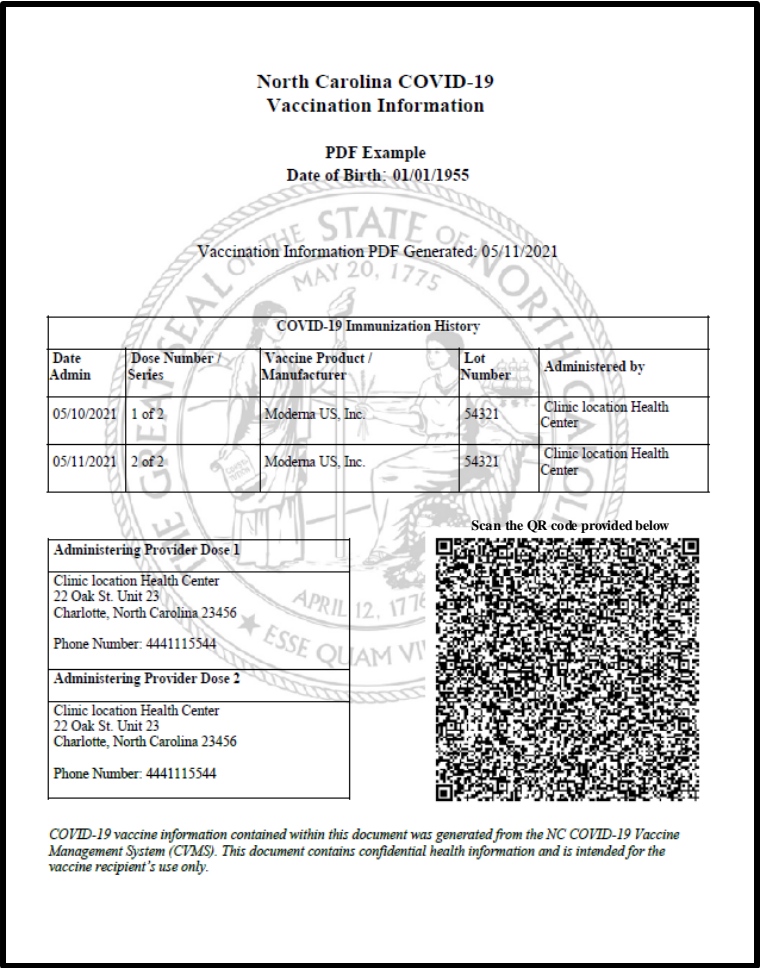
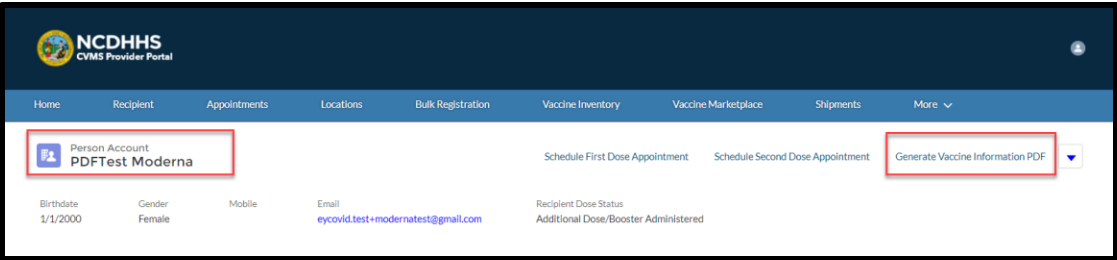
Step 2 of 2: Generate Vaccine Information PDF

You may now generate a PDF document of a recipient's vaccination information that can be downloaded or printed. This PDF document can be generated for any recipient in CVMS.

1. Select the **GENERATE VACCINE INFORMATION PDF** button

2. Print or securely send the document to the recipient

NOTE: If a recipient has received no vaccinations and you click the **GENERATE VACCINE INFORMATION PDF** button, there will be an error. If a recipient has received more than 2 doses, information for all doses will appear on the PDF document.



Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips


To print the Vaccination Information PDF document in Spanish, the recipient will have to log into the COVID-19 Vaccine Portal, set the language to Spanish, and then generate the PDF document for themselves. The PDF document cannot be generated in Spanish from the CVMS Provider Portal.

Other Operations Available to Edit a Recipient or an Administration Record Post-Vaccination

Edit a Recipient Registration Record Details

Step 1 of 4: Navigate to the CVMS Provider Portal Recipient Tab

In some instances, a recipient may need their information on the COVID-19 Vaccine Registration form edited. To do so, navigate to the Recipient Tab.



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You are currently logged in as Clinic ABC Loc 1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Feb 09, 21, 09:30 AM	John3 Deere3 Dose 1 Scheduled	00112756	Clinic ABC Loc 1
Feb 09, 21, 04:39 PM	reji11 ayod11 Dose 1 Scheduled	00112837	Clinic ABC Loc 1
Feb 09, 21, 04:47 PM	reji12 ayod12 Dose 2 Scheduled	00112842	Clinic ABC Loc 1

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Step 2 of 4: Search for the Recipient

- 1. Enter the recipient's **NAME** (first name and last name) in the search bar for the recipient who needs their COVID-19 Vaccine Registration form updated
- 2. To help narrow results, enter the recipient's **DATE OF BIRTH** or **EMAIL ADDRESS** in the appropriate field

Note: The Date of Birth field can only be used if there is a name or email address in the search bar, and cannot be used by itself


- 3. Click **SEARCH**
- 4. Click on the desired recipient from your search results

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

Only select a recipient record that populates in the **RECIPIENTS WITHIN CVMS** section of your search results



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Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Joey

Email, John@j.com

Date of Birth (optional), MM/DD/YYYY


Search

Recipients within CVMS

1994 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Pro...	Recipient Do...	Date of Adm...	Email	Inactive Rea...
Joey		Recipient	Jan 1, 1955	Male		Dose 1 Scheduled		steven.j.digangi@...	
Joe27		Johnson27	Mar 3, 1903					abelluat12+bb27...	

Step 3 of 4: Edit the Recipient's Information

- 1. From the recipient's Person Account, click the pencil icon  next to the field you need to edit
- 2. Make any necessary changes (fields where you've made an unsaved change will be highlighted in **YELLOW**)
- 3. Click **SAVE**

11/1/2023

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Bulk Registration

Vaccine Inventory

Person Account

Joey Recipient

Register

Schedule First

Birthdate

Gender

Mobile

Email

Recipient Dose Status

Dose 1 Scheduled

Details

Related

You can view the full details of each vaccine administration by clicking on a single Vaccination Log Name hyperlink or click "View All" for all history.

Vaccination Logs (1)

VL-000016921

Date and Time of Vaccination:

Vaccine Status:

Vaccine:

Dose 1 Scheduled

View All

Account Name

Joey Recipient

Gender

Male

Race

White

Employer

Disabilities

Not Disabled

Birthdate

1/1/1955

Ethnicity

Not Hispanic or Latino

Recipient Dose Status

Dose 1 Scheduled

Mark Inactive?

☐

Inactive Reason

* Account Name

Salutation

--None--

First Name

Joey

Middle Name

* Last Name

Recipient

Suffix

* Gender

Male

* Race

White

Employer

Search Accounts...

Disabilities

Available

Cancer

Chosen

Not Disabled

Cancel

Save

* Birthdate

1/1/1965

* Ethnicity

Not Hispanic or Latino

Recipient Dose Status

Dose 1 Scheduled

Mark Inactive?

☐

Inactive Reason

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

If you make an update that you did not mean to make, you can select the **UNDO** arrow to revert to the original value or click **CANCEL**.

The Vaccination Log at the top of the page cannot be edited. It is a summary of the doses administered to the recipient. See the [EDIT VACCINE ADMINISTRATION DETAILS](#) section of this user guide for more information.



Step 4 of 4: Confirm Updates

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Person Account

Joey Recipient

Register

Schedule First Dose

Birthdate

Gender

Mobile

Email

Recipient Dose Status

1/1/1965

Male

steven.j.digangi@accenture.com

Dose 1 Scheduled

Details

Related

You can view the full details of each vaccine administration by clicking on a single Vaccination Log Name hyperlink or click "View All" for all history.

Vaccination Logs (1)

VL-000016921

Date and Time of Vaccination:

Vaccine Status:

Vaccine:

Dose 1 Scheduled

View All

Account Name

Joey Recipient

Gender

Male

Race

White

Employer

Disabilities

Not Disabled

Other Disability

MPI

Birthdate

1/1/1965

Ethnicity

Not Hispanic or Latino

Recipient Dose Status

Dose 1 Scheduled

Mark Inactive?

☐

Inactive Reason

Preferred Language

English

The updated information will now show as part of the recipient’s record.

Review the information that you entered to ensure it is correct.

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager

Tips


Any changes you make to a recipient’s record will also be reflected when the recipient logs in to the COVID-19 Vaccine Portal.

Change the Recipient of a Vaccine Administration

Step 1 of 5: Navigate to Recipient Tab

When a **HEALTHCARE PROVIDER** enters Vaccine Administration details for the wrong **RECIPIENT**, the Healthcare Provider must change the recipient for the entered Vaccine Administration details.

To begin, navigate to the **RECIPIENT** tab.



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Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Test Tester

Email, John@j.com

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

5 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Pro...	Recipient Do...	Date of Adm...	Email	Inactive Rea...
Test		Tester	Jan 1, 1965	Male	Moderna (14 dos...	Dose 1 Administ...	Dec 1, 2020, 11:1...		
Test7405SH	KT	TESTER	Jul 28, 1999	Unknown		Additional Dose ...		shtester999+sh7...	
Test7405	SH	Tester	Jul 20, 1999	Female	Janssen COVID-...	Additional Dose ...	Jul 20, 2021, 06:...	shtester999+74...	
TEST		TESTER	Jan 3, 1979	Other	Pfizer (14 Doses/...	Dose 2 Administ...	May 20, 2021, 01...		
testerJo		test	Jan 29, 2002					ibinnca@gmail.co...	

Audience


Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

Healthcare Providers can only change Vaccine Administration recipient for recipients who received their COVID-19 vaccine through the same location as the Healthcare Provider.




NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

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Step 2 of 5: Locate Recipient

Clicking on the **RECIPIENT TAB** takes you to a screen to search all recipients in CVMS.

- 1. Type in the incorrect recipient's name in the search box
- 2. Click **SEARCH**
- 3. Select the recipient's name



NCDHHS
CVMS Provider Portal

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Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Test Tester

Email, John@j.com

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

5 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Pro...	Recipient Do...	Date of Adm...	Email	Inactive Rea...
Test		Tester	Jan 1, 1965	Male	Moderna (14 dos...	Dose 1 Administ...	Dec 1, 2020, 11:1...		
Test7405SH	KT	TESTER	Jul 28, 1999	Unknown		Additional Dose ...		shtester999+sh7...	
Test7405	SH	Tester	Jul 20, 1999	Female	Janssen COVID-...	Additional Dose ...	Jul 20, 2021, 06:...	shtester999+74...	
TEST		TESTER	Jan 3, 1979	Other	Pfizer (14 Doses/...	Dose 2 Administ...	May 20, 2021, 01...		
testerJo		test	Jan 29, 2002					ibinnca@gmail.co...	


Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Step 3 of 5: Locate Recipient Details

Clicking on the **RECIPIENT** name takes you to the account details of the recipient.

- 1. Click on the **RELATED** tab under the recipient's name to view appointment information
- 2. Select the appointment record that needs to be changed to another recipient (the **VACCINE STATUS** will say either **DOSE 1 ADMINISTERED**, **DOSE 2 ADMINISTERED**, or **ADDITIONAL DOSE / BOOSTER ADMINISTERED**)



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 Person Account
Test Tester

RegisterSchedule First D

Birthdate

Gender

Mobile

Email

Recipient Dose Status

1/1/1965


Male

444-555-6666

Dose 1 Administered

Details

Related

 Appointments (2)

Appointment	Date and Time of Vaccination	Vaccine Status	Vaccine
09103206	12/1/2020, 11:18 AM	Dose 1 Administered	Moderna (14 doses/vial) COV... <div></div>
09103194		Registered	<div></div>

View All

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Step 4 of 5: Change Recipient

Selecting the appointment record takes you to the appointment details screen.

Click **CHANGE RECIPIENT** in the top right corner to transfer the **VACCINE ADMINISTRATION** details to the correct recipient.

NCDHHS
CVMS Provider Portal

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Change Recipient

Change Vaccine Inventory

Remove this Administration

DETAILS

RELATED

Case Number

09103206

Account Name

[TestLoc_UAT1](#)

Name

[Test Tester](#)

Appointment DateTime ⓘ

12/1/2020, 11:18 AM

Date and Time of Vaccination ⓘ

12/1/2020, 11:18 AM

Adverse Reaction Consent ⓘ

☒

Schedule Dose2 Followup Email ⓘ

☐

Cancellation Reason ⓘ

Cancellation Description

Cancelled by System via Batch Job ⓘ

☐

State Sponsored Contract ⓘ

☐

Additional Vendor Type (SSC) ⓘ

State or Federal Allocation

State

Vaccine Status

Dose 1 Administered

Vaccine

[Moderna \(14 doses/vial\) COVID-19 Vaccine_inactive](#)

Vaccine Inventory

[Mod2](#)

Lot #

Mod2000-2

Vaccine Dosage

First Dose

Injection Site ⓘ

Left Deltoid

Route

Intramuscular (IM)

Administered By

[Steve DiGangi](#)

On Behalf of (Clinician)

Audience

**Healthcare
Provider**

Healthcare Location Manager

Statewide Location Manager

Step 5 of 5: Locate Correct Recipient

A Change Recipient pop-up box will appear.

1. Search for the correct recipient in the **UPDATED CONTACT NAME** field and click their name
2. Click **FINISH**
3. A Success Confirmation pop-up should appear at the top of the screen

Change Recipient

Existing Contact Name:
Test Tester

Updated Contact Name:

Jon Test

Jon Test
rtest2144@gmail.com • Jan 1, 2000

Test John
sushh210@gmail.com • Jan 1, 2001

Test John King
eycovid.test+333@gmail.com • May 30, 2000

Cancel Finish

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager

Tips

The status of the incorrect recipient will be reverted to their previous status, (e.g., 'Dose 1 Administered' will revert to 'Registered').

The correct recipient's status will be updated to reflect the administered vaccine (e.g., updated from 'Registered' to 'Dose 1 Administered').

Remove Vaccine Administration

Step 1 of 5: Navigate to Recipient Tab

When a **HEALTHCARE PROVIDER** enters Vaccine Administration details erroneously and the Vaccine Administration needs to be completely cleared from CVMS, the Healthcare Provider must **REMOVE** the Vaccine Administration details.


To begin, navigate to the **RECIPIENT** tab.

Audience

Healthcare
Location
Manager

Tips

Healthcare Location Managers can only remove Vaccine Administration for recipients who received their COVID-19 vaccine through the same location as the Healthcare Provider.



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You are currently logged in as TestLoc_UAT1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jun 25, 21, 02:22 PM	test34 demo34 Dose 1 Scheduled	09123116	TestLoc_UAT1

Appointment Walk-In


You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Step 2 of 5: Locate Recipient

- Clicking on the **RECIPIENT TAB** takes you to a screen to search all recipients in CVMS.
- 1. Type in the name of the recipient that has the incorrect vaccination administration in the search box
 - 2. Click **SEARCH**
 - 3. Select the recipient's name

Audience

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Manager



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Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Test Removal

Email, John@j.com

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

1 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Produ...	Recipient Dose...	Date of Admini...	Email	Inactive Reason
Test		Removal	Jan 1, 1966	Male	Pfizer-BioNTech (6 ...	Dose 1 Administered	Jun 25, 2021, 02:36...		

Previous

Page 1 out of 1

Next

Step 3 of 5: Locate Recipient Details

Clicking on the **RECIPIENT** name takes you to the account details of the recipient.

- 1. Click on the **RELATED** tab under the recipient's name to view appointment information
- 2. Select the appointment record that needs to be completely removed from CVMS (the **VACCINE STATUS** will say either **DOSE 1 ADMINISTERED**, **DOSE 2 ADMINISTERED**, or **ADDITIONAL DOSE / BOOSTER ADMINISTERED**)

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Healthcare
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Manager

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Person Account

Test Removal

Register

Schedule First Dose Appointment

Birthdate

Gender

Mobile

Email

Recipient Dose Status

1/1/1966

Male

Dose 1 Administered

DETAILS

RELATED

Appointments (2)

Appointment	Date and Time of Vaccination	Vaccine Status	Vaccine
09123120	6/25/2021, 2:36 PM	Dose 1 Administered	Pfizer-BioNTech (6 doses/via...
09123119		Registered	


View All

Step 4 of 5: Remove Administration from Recipient

Selecting the appointment record takes you to the appointment details screen. Click **REMOVE THIS ADMINISTRATION** in the top right corner to clear the record of the **VACCINE ADMINISTRATION** from CVMS.

Audience

Healthcare
Location
Manager



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Remove this Administration

Change Vaccine Inventory

Change Recipient

DETAILS

RELATED

Case Number

09123120

Account Name

TestLoc_UAT1

Name

Test Removal

Appointment DateTime

6/25/2021, 2:36 PM

Date and Time of Vaccination

6/25/2021, 2:36 PM

Adverse Reaction Consent

☒

Schedule Dose2 Followup Email

☐

Cancellation Reason

Cancellation Description

Vaccine Status

Dose 1 Administered

Vaccine

Pfizer-BioNTech (6 doses/vial) (25 MDV) COVID-19 Vaccine

Vaccine Inventory

EHR Vaccine

Lot #

10021

Vaccine Dosage

First Dose

Injection Site

Left Deltoid

Route

Intramuscular (IM)

Administered By

Steve DiGangi

On Behalf of (Clinician)

Step 5 of 5: Confirm Vaccine Administration Removal

A pop-up box will appear.

- 1. Verify the details of the vaccine administration that you intend to remove
- 2. Select a required **REMOVAL REASON** from the drop-down list
- 3. Enter an optional **REMOVAL DESCRIPTION** to elaborate on the vaccine administration removal
- 4. Click **CONFIRM**
- 5. When the final confirmation screen appears, select **SAVE**
- 6. The vaccine administration data will be removed from the recipient's record, and the vaccine inventory record will be credited by one available dose

Audience

Healthcare
Location
Manager

Tips

The status of the recipient will be reverted to their previous status, (e.g., 'Dose 1 Administered' will revert to 'Dose 1 Cancelled').

Remove this Administration

Vaccine:
Pfizer-BioNTech (6 doses/vial) (195 MDV) COVID-19 Vaccine

Vaccine Inventory:
Lot 1234567 - exp 1/1/2022

Vaccine Dosage:
Second Dose

Lot #:
1234567

Injection Site:
Left Deltoid

On Behalf of (Clinician):
Darrell Lee

Route:
Intramuscular (IM)

Date and Time of Vaccination:
8/20/2021, 11:54 AM

Adverse reaction Consent:
true

IsVaccineCertificateGenerated:
true

Administered By:
Steve DiGangi

* Removal Reason

Administration recorded in error

Removal Description:
Accidentally recorded administration when it did not occur

Upon clicking confirm, it will clear out these fields.

Cancel

Confirm

--None--
Duplicate
Administration recorded in error
EHR data error
Other

Confirmation

Clicking save will update the following: Remove Vaccination Details. Update Status of this Recipient. Credit one (1) Available Dose back to the Vaccine Inventory/Lot.

Cancel

Save

NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

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Enter an Additional Dose / Booster Administration

Additional Dose / Booster Considerations

When selecting which dose the recipient is receiving, you have the option of choosing **ADDITIONAL DOSE / BOOSTER**. The **ADDITIONAL DOSE / BOOSTER** selection should be used when a recipient is getting any administration of a COVID-19 vaccine **AFTER THE SECOND DOSE**. If you select **ADDITIONAL DOSE / BOOSTER** for a recipient who does not have a Dose 2 recorded in CVMS, you will see a warning message appear at the top of the screen.

A recipient may receive a vaccine administration of **DOSE 1, DOSE 2**, and multiple **ADDITIONAL DOSE** administrations until there are **SIX** total administrations. Once they have received six total administrations, the recipient will not be able to book another appointment or have another vaccine administration logged into CVMS.

The screenshot displays the NCDHHS CVMS Provider Portal interface. At the top, a navigation bar includes links for Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, Vaccine Marketplace, Shipments, and More. A warning message is prominently displayed in an orange box at the top center, stating: "Warning: Please verify the recipient has received their Second Dose before choosing Additional Dose." Below the navigation bar, a progress indicator shows the current step in the process. The main content area is titled "Vaccine Administration" and contains two sections: "Vaccination Details" and "Medical History". In the "Vaccination Details" section, there is a dropdown menu for "Injection Site" and three buttons for selecting a dose: "Dose 1", "Dose 2", and "Additional Dose Selected". The "Additional Dose Selected" button is highlighted with a red border. The "Medical History" section displays information such as "Appointment: Test", "DOB: Jun 8, 2005", "Age: 16", and "Gender: Male".

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager

Tips

Please review the CDC website at <https://www.cdc.gov/coronavirus> for the most up-to-date information regarding the guidance for additional doses.

For more detailed clinical guidance, please visit: <https://www.cdc.gov/vaccines/covid-19/clinical-considerations/covid-19-vaccines-us.html>

Janssen (J&J) Additional Dose / Booster

Once appropriate guidance is provided by the CDC and NCDHHS for administering Janssen (J&J) additional dose/boosters, CVMS will allow the additional dose/booster administration to be recorded. A message will now display on the Vaccine Administration screen under **VACCINE DETAILS** directing providers to enter the administration as **DOSE 2/SECOND DOSE** until further notice.

Vaccination Details

* Injection Site

--Select Injection Site--

Janssen (J&J) Boosters should temporarily be entered as a Dose 2/Second Dose until further enhancements are made to CVMS.

Dose 1

Dose 2

Additional Dose/Booster

* Route

☐ Intramuscular (IM)

☐ Subcutaneous (SQ)

☐ Intradermal (ID)

* Date and Time of Vaccination

DateTime

Oct 20, 2021

1:52 PM

On Behalf of (Clinician)

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Moderna Additional Dose / Booster

Moderna’s booster vaccine is 50% of the regular dose. If the **VACCINE PRODUCT** selected is Moderna, CVMS will generate a **VACCINE DOSE AMOUNT** box where a provider must select whether a full dose or a half dose was administered.

Note: *Recipients who received Moderna and are moderately to severely immunocompromised are recommended to receive a full dose of the Moderna vaccine as an additional dose to their original two dose series.*

Vaccine Product

Moderna (10 doses/vial) COVID-19 Vaccine

Manufacturer

Moderna US, Inc.

Available Vaccine Inventory

-- Select Vaccine Inventory --

Vaccine Dose Amount ⓘ

--Select Vaccine Dose Amount--

--Select Vaccine Dose Amount--

Full Dose - 0.50 mL

Half Dose - 0.25 mL

Serial Number

NDC

Expiration Date

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager

Enter Dose Administration Records Out of Order

Out of Order Dose Considerations

On rare occasions, a recipient will already have the vaccine administration details logged for a second dose before the first dose has been entered into CVMS. When that occurs, the vaccinating provider can retroactively log the first dose if the first dose was administered by the same provider location.

The screenshot shows the NCDHHS CVMS Provider Portal interface. At the top, there's a navigation bar with 'Home', 'Recipient', 'Appointments', 'Locations', and 'Bulk Registration'. Below this is a 'Vaccination Log' table with columns for 'Dose Details', 'Date & Time', 'Administered By', and 'On Behalf Of (Cli...)'. A row in the log shows 'Second Dose', 'Sep 7, 2021, 01:27:52 ...', and 'Steve DiGangi', which is highlighted with a red box. Below the log is the 'Vaccination Details' section. It includes a dropdown for 'Injection Site' (currently showing '--Select Injection Site--'), three buttons for 'Dose 1', 'Dose 2', and 'Additional Dose' (with 'Dose 1' highlighted by a red box), radio buttons for 'Route' (Intramuscular (IM), Subcutaneous (SQ), Intradermal (ID)), and a section for 'Date and Time of Vaccination' with input fields for 'Date' (Sep 7, 2021) and 'Time' (1:28 PM).

To log the **DOSE 1** vaccine administration details:

1. Use the **APPOINTMENT WALK-IN TOOL** to book an appointment for the recipient
2. Begin logging vaccine administration details, and select the **DOSE 1** button (the **DOSE 2** button will be grayed out, and **DOSE 2** details will appear at the top of the screen)
3. Correct the date and time to the date of administration
4. Verify the other vaccine administration details, and submit the administration

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager

Tips

This same process may be used to log a **DOSE 2** if an **ADDITIONAL DOSE / BOOSTER** has already been logged.


Do NOT enter in vaccine administration details for a vaccine dose that your location did not administer.

Cancel an Existing Appointment

Step 1 of 5: Navigate to the Appointments Tab

The process to cancel an existing appointment for a recipient begins on the **APPOINTMENTS** tab.

- 1. Navigate to the **APPOINTMENTS** tab



Home

Recipient

Appointments

Help & Information

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Please be sure to bookmark this site: <https://uat3-ncdhhs.cs32.force.com/VaccineProvider>

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 10:59 AM	Test-1.4 Scenario145 Dose 1 Scheduled	00112065	Clinic ABC Loc 1
Jan 19, 21, 03:01 PM	Walkin Example Dose 2 Scheduled	00111942	Clinic ABC Loc 1

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

Providers using CVMS Direct (Electronic Health Record system integration with CVMS) may also notice cancelled appointments appearing in CVMS. Those appointments are created during the integration process and will be automatically cancelled and marked as **DUPLICATE** since they are a replica of the scheduled appointment.

Step 2 of 5: Search for the recipient


- 1. You can use the **SEARCH APPOINTMENTS** field to search for the recipient by **NAME**
- 2. Set the **FROM** and **TO** fields to include the date of the appointment that needs to be cancelled (the field will default to the current date)
- 3. Click **SEARCH**

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager




Home

Recipient

Appointments

Help & Information

You are currently logged in as Clinic Org1

 Appointments

All Appointments

Cancel Appointment

3 items

Search Appointments

Search Case/Confirmation Number

From

2021-04-01

To

Status

--- None ---

Search

Reset

3 records found.

<input type="checkbox"/>	Case	Confirmati...	Date	Time	Recipient ...	DOB	Location	Cancellatio...	Vaccine ...	Status
<input type="checkbox"/>	03499186		Apr 12, 2021	1:11:27 PM	Walkin Example	1965-12-12			Dose 1 Schedul...	New
<input type="checkbox"/>	03499652		Apr 12, 2021	6:07:01 PM	Steve Rodger	2000-01-01			Dose 1 Schedul...	New
<input type="checkbox"/>	03499746	d75449mzu5.1	Apr 12, 2021	7:00:00 PM	Peter Parker	2000-03-03			Dose 1 Schedul...	New

← Previous

Page 1 out of 1

Next →

Step 3 of 5: Locate the Appointment to Cancel

After clicking search, the existing **APPOINTMENTS** will populate underneath the Appointments List View.


- 1. Locate the correct **RECIPIENT** who needs an appointment cancelled
- 2. Verify the recipient's identity
- 3. Select the checkbox to the left of the recipient's name
- 4. Select the **CANCEL APPOINTMENT** button

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

**NCDHHS**
CVMS Provider Portal

Home

Recipient

Appointments

Help & Information

You are currently logged in as Clinic Org1

Appointments

All Appointments

3 items

Cancel Appointment

Search Appointments

Search Case/Confirmation Number

From

To

Status

Search by Name, Location, Vaccine Status

2021-04-01

--- None ---

Search

Reset

3 records found.

<input type="checkbox"/>	Case	Confirmati...	Date	Time	Recipient ...	DOB	Location	Cancellatio...	Vaccine ...	Status
<input checked="" type="checkbox"/>	03499186		Apr 12, 2021	1:11:27 PM	Walkin Example	1965-12-12			Dose 1 Schedul...	New
<input type="checkbox"/>	03499652		Apr 12, 2021	6:07:01 PM	Steve Rodger	2000-01-01			Dose 1 Schedul...	New
<input type="checkbox"/>	03499746	d75449mzu5.1	Apr 12, 2021	7:00:00 PM	Peter Parker	2000-03-03			Dose 1 Schedul...	New

← Previous


Page 1 out of 1

Next →

Step 4 of 5: Cancel the Appointment

Selecting the **CANCEL APPOINTMENT** button will initiate a pop-up window to appear on the screen.

1. Input a **CANCELLATION REASON** from the drop-down menu (you may optionally add a cancellation description in the free text field)
2. Select the **CANCEL APPOINTMENT** button



NCDHHS

CVMS Provider Portal

Home

Recipient

Appointments

Help & Information

You are currently logged in as

Appointments

All Appointments

3 items

Cancel Appointments

DATE	TIME	RECIPIENT NAME	DOB	PROVIDER LOCATION	CANCELLATION REASON	CANCELLATION DESCRIPTION
Apr 12, 2021	01:11 PM	Walkin Example	1965-12-12	Clinic Org1	choose one...	
Apr 12, 2021	1:11:27 PM	Walkin Example	1965-12-12			1 Scheduled
Apr 12, 2021	6:07:01 PM	Steve Rodger	2000-01-01			Dose 1 Scheduled
Apr 12, 2021	7:00:00 PM	Peter Parker	2000-03-03			Dose 1 Scheduled

← Previous

Page 1 out of 1

Next →

Cancel Appointment

Status

--- None ---

Search

Reset

Status

▼

New

▼

New

▼

New

▼

Audience


Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Step 5 of 5: Confirm the Appointment is Cancelled

The recipient should no longer have their appointment booked. If the recipient’s appointment was for today, the recipient should no longer appear on the **TODAY’S APPOINTMENTS** tool.



[Home](#) [Recipient](#) [Appointments](#) [Help & Information](#)

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 10:59 AM	Test-1.4 Scenario145 Dose 1 Scheduled	00112065	Clinic ABC Loc 1

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Automated Cancellation

There are a few scenarios that may result in an automatic cancellation:

- if a recipient is manually added to **TODAY'S APPOINTMENTS** but does not complete their appointment within 72 hours, the appointment will be **AUTOMATICALLY** cancelled, and their Dose Status will update to **DOSE 1 CANCELLED, DOSE 2 CANCELLED, or ADDITIONAL DOSE / BOOSTER CANCELLED**).
- if a recipient creates multiple scheduled appointments (for example at different locations in hopes of being vaccinated as quickly as possible), all the remaining appointments will be automatically cancelled as soon as one of the appointments is changed to a **DOSE 1 ADMINISTERED, DOSE 2 ADMINISTERED, OR ADDITIONAL DOSE / BOOSTER ADMINISTERED** status

The screenshot displays the NCDHHS CVMS Provider Portal interface. The 'Recipient' tab is selected in the top navigation bar. The 'Person Account' section shows 'Mr. Test Data' with fields for Birthdate, Gender (Male), Mobile, Email, and Recipient Dose Status (Dose 1 Canceled). The 'RELATED' tab is also selected, showing a table of appointments. The first appointment, with ID 08705594, is highlighted with a red box and shows a status of 'Dose 1 Canceled'.

Appointment	Date and Time of Vaccin...	Vaccine Status	Vaccine
08705594		Dose 1 Canceled	
08705593		Registered	

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager

View Appointment / Cancellation History

To view a record of a recipient’s appointment history, navigate to the Recipient tab, locate the recipient’s record, and select **RELATED** tab. The recipient’s appointment records will appear. Selecting an appointment record will bring up the details of that appointment, including a **CANCELLATION REASON** if applicable.

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Person Account

Mr. Test Data

Register

Search

Birthdate

Gender

Male

Mobile

Email

Recipient Dose Status

Dose 1 Canceled

DETAILS

RELATED

Appointments (2)

Appointment	Date and Time of Vaccination	Vaccine Status	Vaccine
08705594		Dose 1 Canceled	
08705593		Registered	

View All

Home

Recipient

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DETAILS

RELATED

Remove this Administration

Change Vaccine Inventory

Change Recipient

Case Number

08705594

Vaccine Status

Dose 1 Canceled

Account Name

Clinic location1

Vaccine

Name

Test Data

Vaccine Inventory

Appointment DateTime

4/21/2021, 4:18 AM

Lot #

Date and Time of Vaccination

Vaccine Dosage

Adverse Reaction Consent

Injection Site

Schedule Dose2 Followup Email

Route

Cancellation Reason

Duplicate

Administered By

Cancellation Description

On Behalf of (Clinician)

Cancelled by System via Batch Job

☒

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips


If an appointment was cancelled automatically, the **CANCELLED BY SYSTEM VIA BATCHJOB** field will be checked.

Mark a Recipient as Deceased

Step 1 of 5: Navigate to the Recipients Tab

Providers can mark a recipient as deceased within CVMS to ensure that no further system-generated communications are sent to the deceased recipient’s email address.

- 1. Navigate to the **RECIPIENT** tab



Home

Recipient

Appointments

Help & Information

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Please be sure to bookmark this site: <https://uat3-ncdhhs.cs3.zforce.com/vaccineprovider>

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 10:59 AM	Test-1.4 Scenario145 Dose 1 Scheduled	00112065	Clinic ABC Loc 1
Jan 19, 21, 03:01 PM	Walkin Example Dose 2 Scheduled	00111942	Clinic ABC Loc 1

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager

Step 2 of 5: Search for the Recipient

- 1. Enter the deceased recipient's **NAME** (first name and last name) in the search bar
- 2. To help narrow results, enter the recipient's **DATE OF BIRTH** or **EMAIL ADDRESS** in the appropriate field

***Note:** The Date of Birth field can only be used if there is a name or email address in the search bar, and cannot be used by itself*


- 3. Click **SEARCH**
- 4. Click the name of the **DECEASED RECIPIENT**

Audience

Healthcare
Provider

Healthcare
Location
Manager

Statewide
Location
Manager



NCDHHS
CVMS Provider Portal

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Recipient

Appointments

Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Deceased

Email , John@j.com

Date of Birth (optional), MM/DD/YYYY

Search


Recipients within CVMS

1 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Pro...	Recipient Do...	Date of Adm...	Email	Inactive Rea...
Deceased		Recipient	Jan 1, 1922	Male		Dose 1 Scheduled			

Step 3 of 5: Edit Recipient Record

- 1. Click the pencil icon next to the **MARK INACTIVE** field




Home

Recipient

Appointments

Help & Information

 Person Account

Deceased Recipient

Register

Schedule First Dose Appointment

Vaccine Group

Group 2

Recipient Dose Status

Dose 1 Scheduled

DETAILS

RELATED

Account Name

Deceased Recipient

Gender

Male

Race

White

Employer

Vaccine Group

Group 2

Vaccination Status

Registered

Disabilities

Not Disabled

Other Disability

Birthdate

1/1/1922

Ethnicity

Not Hispanic or Latino

Recipient Dose Status

Dose 1 Scheduled

Mark Inactive?

☐

Inactive Reason

Preferred Language

English

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Step 4 of 5: Mark Recipient as Deceased

- 1. Check the box under the **MARK INACTIVE** field
- 2. From the drop-down menu for **INACTIVE REASON**, select **DECEASED**

*Account Name

Salutation

--None--

First Name

Deceased

Middle Name

*Last Name

Recipient

Suffix

*Gender

Male

*Race

White

Employer

Search Accounts...

Vaccine Group

Group 2

Vaccination Status

Registered

*Birthdate

1/1/1922

*Ethnicity

Not Hispanic or Latino

Recipient Dose Status

Dose 1 Scheduled

Mark Inactive?

☒

Inactive Reason

Deceased

Mark Inactive?

☒

Inactive Reason

Deceased

--None--

✓ Deceased

Bad Data

Duplicate

Inactive Reason

Bad Data

You do not have permission to specify this Inactive reason. Please confirm the selection.

Note: If you select **BAD DATA** or **DUPLICATE** you will receive an error message.

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips


If a recipient record needs to be marked inactive because it is either bad data or a duplicate of another record, please submit a request through the **CVMS HELP DESK PORTAL** at https://ncgov.servicenowserVICES.com/csm_vaccine.

Step 5 of 5: Confirm Update

- 1. After updating the recipient's record to **DECEASED**, a pop-up message appears asking you to confirm that the information has been validated
- 2. On the Recipient tab, the deceased recipient will now show **DECEASED** in the **INACTIVE REASON** column

You have marked this record as Deceased. Please check this information has been validated.

OK

 **NCDHHS**
CVMS Provider Portal

Home Recipient Appointments Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Deceased

Email , John@j.com

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

1 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Pro...	Recipient Do...	Date of Adm...	Email	Inactive Rea...
Deceased		Recipient	Jan 1, 1922	Male		Dose 1 Scheduled			Deceased

Audience


- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Review Recipient Vaccination Report

Step 1 of 2: Navigate to the Reports Tab

Healthcare Location Managers may also run a report in the CVMS Provider Portal that shows a roll-up of recipient vaccination information at your location. Vaccine administration data can be reviewed directly in CVMS or can be exported as a .CSV file to Microsoft Excel.

1. Navigate to the **REPORTS** tab
2. Select **ALL REPORTS**
3. Click **RECIPIENT VACCINATION REPORT**


NCDHHS
 CVMS Provider Portal

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[Bulk Registration](#)
[Vaccine Inventory](#)
[Vaccine Marketplace](#)
[Shipments](#)
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For assistance with field definitions for the Reports below, please visit the Help & Information tab and view the Dictionary for Provider Reports help articles.

Reports
All Reports
 10 items

[Organization Management](#)
[Help & Information](#)
[Reports](#)
[Account Management](#)
[Files](#)

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent						
Created by Me	Marketplace Inquiries	All Inquiries created for various Vaccine Marketplace 'Seek Transfer Match Requests'	Provider Reports	Copado Integration Use	7/16/2021, 4:11 AM	
Private Reports						
All Reports	Recipient Vaccination Report	This report shows the completed vaccine administration details for the current logged in user's location(s).	Provider Reports	George Jaramillo	1/31/2021, 11:08 PM	
FOLDERS						
All Folders						

Audience

Healthcare Location Manager

Tips

To learn more on using reports in **CVMS**, please check the **Step 5 – Navigate the CVMS Provider Portal User Guide** at <https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers#step-6---navigate-the-cvms-provider-portal>.

Step 2 of 2: Review Recipient Vaccination Report

- 1. Sort, filter, or review the report as needed
- 2. Click **EXPORT** if you would like to download the data into a spreadsheet

Audience

Healthcare
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Manager

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Report: Appointments with Accounts and Contacts

Recipient Vaccination Report

This report shows the completed vaccine administration details for the current logged in user's location(s).

Export

<input type="checkbox"/> Account Name: Account Name ↑	<input type="checkbox"/> Account Name: Provider PIN ↑	<input type="checkbox"/> Date and Time of Vaccination ↓	<input type="checkbox"/> Contact Name: Account Name: Last Name	<input type="checkbox"/> Contact Name: Account Name: First Name	<input type="checkbox"/> Contact Name: Birthdate
<input type="checkbox"/> Solutions Loc1 (48)	0922 (48)	7/25/2021 (1)	NewRecipient	Jackie	11/13/19
		Subtotal			
		7/21/2021 (1)	AdminTest	Vaccine	5/22/19
		Subtotal			
		6/28/2021 (1)	NewRecipient	Jon	11/5/19
		Subtotal			
		6/17/2021 (1)	Test	Jane	11/7/19
		Subtotal			
		6/11/2021 (1)	NewRecipient	Jon	11/5/19
		Subtotal			
		6/4/2021 (1)	Test	Jill	1/1/19
		Subtotal			
		6/2/2021 (1)	Test	Jill	1/1/19
		Subtotal			
		7/25/2021 (1)			

☐ Account Name: Account Name ↑

☐ Account Name: Provider PIN ↑

☐ Date and Time of Vaccination ↓

☐ Contact Name: Account Name: Last Name

☐ Contact Name: Account Name: First Name

☐ Contact Name: Birthdate

☐ Solutions Loc1 (48)

0922 (48)

7/25/2021 (1)

Row Counts

☒

Detail Rows

☒

Subtotals

☒

Grand Total

☒

Checking-in a Recipient at the Front-desk (Locations that enabled the scheduling feature in CVMS)

For information on how to enable the scheduling feature in CVMS, please refer to the **Step 9 – Invite Recipients to Self-Schedule Their Appointments User Guide** at <https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers>

Check-In Recipients with Scheduled Appointments

Method 1: Begin Vaccine Administration through Today's Appointments

There are three methods to begin the **VACCINE ADMINISTRATION** process.


The provider who will administer the COVID-19 vaccine can select the Recipient under **TODAY'S APPOINTMENTS** on the **HOME PAGE** which will begin the **VACCINE ADMINISTRATION** process.

- 1. Click on the **RECIPIENT'S NAME** to begin the Vaccine Administration
- 2. Begin **VACCINE ADMINISTRATION**

Audience

Healthcare
Provider

Healthcare
Location
Manager



HomeRecipientsAppointmentsHelp & Information

You are currently logged in as Clinic ABC Loc 1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 03:01 PM	Walkin Example Dose 2 Scheduled	00111942	Clinic ABC Loc 1
Jan 19, 21, 03:55 PM	Test-1.4 Scenario8 Dose 1 Scheduled	00111940	Clinic ABC Loc 1
Jan 19, 21, 04:00 PM	VaccineAdmin Test Dose 1 Scheduled	00112070	Clinic ABC Loc 1

Method 2: Enter the Appointment Confirmation Number


Alternatively, you can begin the **VACCINE ADMINISTRATION PROCESS** by entering the Recipient's **APPOINTMENT CONFIRMATION NUMBER** that they received after scheduling their appointment online using the scheduling feature in CVMS.

- 1. Enter the **APPOINTMENT CONFIRMATION NUMBER** under the Recipient Check In tool
- 2. Click **GO** to begin the **VACCINE ADMINISTRATION**

Audience

Healthcare
Provider

Healthcare
Location
Manager



Home

Recipient

Appointments

Help & Information

You are currently logged in as Clinic ABC Loc 1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 03:01 PM	Walkin Example Dose 2 Scheduled	00111942	Clinic ABC Loc 1
Jan 19, 21, 03:55 PM	Test-1.4 Scenario8 Dose 1 Scheduled	00111940	Clinic ABC Loc 1
Jan 19, 21, 04:00 PM	VaccineAdmin Test Dose 1 Scheduled	00112070	Clinic ABC Loc 1

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Method 3: Check In the Recipient in the Appointment Tab

Lastly, the **VACCINE ADMINISTRATION** process can begin from the **APPOINTMENTS TAB**.

- 1. Navigate to the **APPOINTMENTS TAB**
- 2. Find the **CORRECT APPOINTMENT BOOKING** for the Recipient you would like to begin the Vaccine Administration for
- 3. Click the drop-down arrow to the right of their name
- 4. Select **CHECK IN** to begin **VACCINE ADMINISTRATION**

Audience

Healthcare
Provider

Healthcare
Location
Manager

Home

Recipient

Appointments

Help & Information

You are currently logged in as County General Hospital - Chicago ER

Appointments

All Appointments

20 items

Search Appointments

Search by Name, Location, Vaccine Status

Search Confirmation Number

From

2021-03-09

To

Status

New

Search

Reset

Cancel Appointment

<input type="checkbox"/>	Case	Confirmation...	Date	Time	Recipient Na...	DOB	Location	Vaccine Status	Status	
<input type="checkbox"/>	03113939	gcdspjfp9n.1	Mar 9, 2021	8:00:00 AM	Wonder Woman	1940-05-05	County General H...	Dose 1 Scheduled	New	
<input type="checkbox"/>	03113941	k6nxju95p.1	Mar 9, 2021	9:00:00 AM	NWW	1980-01-01	County General H...	Dose 1 Scheduled	New	Check In
<input type="checkbox"/>	03113973	njt65uisi7.1	Mar 9, 2021	12:00:00 PM	Thomas Reece Fl...	1991-03-10	County General H...	Dose 1 Scheduled	New	Book Second Dose

Schedule a First Dose Appointment

Step 1 of 8: Search for the Recipient Record

As a provider, you can schedule a first dose appointment using the scheduling feature in CVMS. To do so, **you must first confirm that the recipient is registered in CVMS.**

Once confirmed, you can begin the scheduling process from the CVMS Provider Portal.

- 1. To begin, click the **RECIPIENT** tab
- 2. **SEARCH FOR THE RECIPIENT** with their name and/or date of birth
- 3. Confirm their Recipient Dose Status is **REGISTERED**
- 4. If the recipient is registered, **open the recipient record**

Audience

Healthcare
Provider

Healthcare
Location
Manager

Tips

For guidance on how to confirm if a recipient is registered in CVMS (and how to register them if they are not), please reference the **Recipient Point of Care** section of this user guide.

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Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex: John Smith) and date of birth.

valeria newman

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Group	Recipient Dose S...	Email
Valeria		Newman	May 31, 1954	Female	Group 1	Registered	valerianewman@mail...

Recipients from Long Term Care Facilities

First Name	Last Name	Date of Birth	Gender	Dose Number
------------	-----------	---------------	--------	-------------

Step 2 of 8: Begin Scheduling the First Dose Appointment

Once you confirm that you opened the correct Recipient record, make sure that the **recipient's preferred method of contact is up to date**, or the recipient will not receive an appointment confirmation notification.

- 1. Click the **SCHEDULE FIRST DOSE APPOINTMENT** button in the upper right corner

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Person Account
Valeria Newman

Register

Schedule First Dose Appointment

Vaccine Group

Group 1

Recipient Dose Status

Registered

DETAILS

RELATED

Account Name

Valeria Newman

Birthdate

5/31/1954

Gender

Female

Ethnicity

Hispanic or Latino

Step 3 of 8: Click Schedule First Dose

Continue into the scheduling feature in CVMS by clicking, **Schedule First Dose**.

CVMS Provider Portal

Home

Recipient

Appointment

Person Account

Valeria Newman

Vaccine Group

Group 1

Recipient Dose Status

Registered

DETAILS

RELATED

Account Name

Valeria Newman

Birthdate

5/31/1954

Gender

Ethnicity

Schedule First Dose Appointment

Schedule first dose appointment:

Schedule First Dose

Cancel

Register

Schedule First Dose Appointment

Audience

Healthcare
Provider

Healthcare
Location
Manager

Step 4 of 8: Search for Location and click, See Availability

A new tab will open and direct you to select a location.

- 1. Search using an **ADDRESS OR ZIP CODE**
- 2. Select a location and click **SEE AVAILABILITY**

YOU HAVE A
SPOT.

TAKE YOUR
SHOT.

Find a location

Enter an address below to find a vaccination center near you

Enter an address or zip code

Search ...

[Use your current location](#)

Continue

YOU HAVE A
SPOT.

TAKE YOUR
SHOT.

Select location

Locations nearest to Wilkesboro, NC 28697, USA [Change](#)

Caldwell County Health Department

25.55 miles away

2345 Morganton Blvd Suite B, Lenoir, North Carolina 28645 828-426-8400

Open 9am - 4:15pm Mon-Thu

See all availability

Audience

Healthcare
Provider

Healthcare
Location
Manager

Step 5 of 8: Select an Appointment Date and Time

You will be prompted to select a date and time for the selected location. Only days with available appointments will appear enabled on the calendar.

- 1. Select an **AVAILABLE DATE**
- 2. Select an **AVAILABLE APPOINTMENT TIME**

Select a date & time

2345 Morganton Blvd Suite B, Lenoir, North Carolina 28645 828-426-8400 [Change](#)

1 Appointment 1

Choose a date and time

March 2021

Sun

Mon

Tue

Wed

Thu

Fri

Sat

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

29

30

31

6 appointments available

For Tuesday March 16, 2021

2:45pm

3:00pm

3:15pm

3:30pm

3:45pm

4:00pm

Continue

Audience

Healthcare
Provider

Healthcare
Location
Manager

Tips

If you need to change the location of the appointment, click the Change button at the top of the page.

Step 6 of 8: Confirm Appointment Details

Review the appointment details before moving forward. If you need to select a new date and time, you can click the X button to select a new appointment for the same location.

- 1. Click **CONTINUE**

Select a date & time

2345 Morganton Blvd Suite B, Lenoir, North Carolina 28645 828-426-8400 [Change](#)

✓

Appointment 1

Tuesday March 16 4:00PM, 2021

X

Continue

< Back

Audience

Healthcare
Provider

Healthcare
Location
Manager

Tips

If you need to change the location of the appointment, this is the last page where you will be able to do so.

Click the Change button at the top of the page.

Step 7 of 8: Click Complete Appointment

The recipient's details are already saved from their registration.

- 1. Scroll down, click **COMPLETE APPOINTMENT**

YOU HAVE A

SPOT.

TAKE YOUR

SHOT.

Please provide the information below

Legal First Name

James

Middle Name (optional)

Legal Last Name

Harden

Address

123 Test Dr

City

Raleigh

County

Wake

State

North Carolina

Zip Code

27609

Best way to contact you (Email will allow you to access your vaccine information in the COVID-19 Vaccine Portal.)

☒ Email

☐ SMS/Text

☐ Both

☐ None

Date of Birth

Month

Day

Year

1

1

1980

Race

Native Hawaiian or Other Pacific Islander

Ethnicity

☐ Hispanic or Latino

☒ Not Hispanic or Latino

☐ Unknown

☐ Declined to State

Gender

☐ Female

☒ Male

☐ Decline to Specify

☐ Other

☐ Unknown

Complete Appointment

Back

Need support?

You may call the COVID-19 vaccine help center at (888)-675-4567, Monday through Friday from 7 a.m. until 7 p.m., and on Saturday and Sunday from 8 a.m. until 4 p.m.

Audience

Healthcare
Provider

Healthcare
Location
Manager

Schedule a Second Dose Appointment

Method 1 - Step 1 of 3: Book Second Dose at Time of First Dose Administration

If a **RECIPIENT** used the scheduling feature in CVMS to book their first appointment and received a vaccine product that requires a second dose, the final page of the **VACCINE ADMINISTRATION** process will display a button labeled **BOOK SECOND DOSE**.

Second dose appointments use the same **AVAILABILITY SCHEDULE** as first dose appointments.

1. To begin, click the **BOOK SECOND DOSE** button

✓

✓

○

Schedule Follow Up

Second Dose Disclaimer

The COVID-19 vaccine requires a booster dose 21 days after your initial dose.

Schedule Second Dose Appointment

Schedule second dose appointment for confirmation number: r5r9naxiek.

Book Second Dose

Medical History

Wonder Woman

DOB: May 5, 1940

Age: 80

Gender

Other

Race

Other

Ethnicity

Unknown

Audience

Healthcare
Provider

Healthcare
Location
Manager

Tips

Healthcare Providers will only see this option for recipients who booked their first dose appointment through the scheduling feature in CVMS.

Method 2 - Step 1 of 3: Book Second Dose After First Dose Administration

You may choose to book a second dose appointment after first dose vaccine administration.

- 1. To begin, navigate to the **LOCATIONS** tab
- 2. Find the **DOSE 1 ADMINISTERED** appointment
- 3. Open the menu and click **SCHEDULE SECOND DOSE**

Audience

Healthcare
Provider

Healthcare
Location
Manager

Tips

Schedule the **SECOND DOSE APPOINTMENT** while the recipient is on-site to confirm that you have availability at the planned appointment time.

Home

Recipient

Appointments

Locations

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More

You are currently logged in as Clinic Location1

Appointments

All Appointments

8 items

Cancel Appointment

Search Appointments

dose 1 administered

Search Case/Confirmation Number

From

2021-03-23

To

Status

--- None ---

Search

Reset

<input type="checkbox"/>	Case	Confirmati...	Date	Time	Recipient ...	DOB	Location	Vaccine St...	Status
<input type="checkbox"/>	03046357	bnddk1of1j.1	Mar 23, 2021	2:05:09 AM	JJ Gillian	1950-03-10	Sked Test Loc56	Dose 1 Admini...	Closed
<input type="checkbox"/>	03045857	r1cmdjn3r5.1	Mar 23, 2021	2:10:34 AM	jenn G yu	1998-09-06		Dose 1 Admini...	Check In
<input type="checkbox"/>	03046413	r7cqf4rwoo.1	Mar 23, 2021	2:11:55 AM	Jennifer G Yu	1998-09-06	TESTCrunkLoc...	Dose 1 Admini...	Schedule Second Dose

Step 2 of 3: Select a Date and Time

The scheduling feature in CVMS will appear in a new tab and will **default to the same location as the first dose** appointment. If the recipient needs to change the location, the new provider location must book the appointment for the recipient.

1. Select a date for the second dose

NOTE: The first available date for a second dose is based upon the product the recipient received for their first dose (21 days or 28 days). For example, if a recipient was vaccinated with Pfizer with a recommended 21-day interval for their second dose, the earliest possible appointment for their second dose would be 21 days after their first dose. However, the recipient should be scheduled as close to the recommended interval as possible.

2. Select an available time slot for the second dose

Schedule Dose 2

2110 Blue Ridge Rd, Raleigh, North Carolina 27607 [Change](#)

Now that you have received your first dose, please choose a time for your follow up appointment.

2

Appointment 2

Choose a date and time

April 2021

Sun

Mon

Tue

Wed

Thu

Fri

Sat

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

29

30

9 appointments available

For Sunday April 11, 2021

8:00am

9:00am

10:00am

11:00am

12:00pm

1:00pm

2:00pm

3:00pm

4:00pm

Complete Appointment

< Back

Audience

Healthcare
Provider

Healthcare
Location
Manager

Tips

You will not be able to schedule an appointment too early. The scheduling feature in CVMS will show you the correct timeline for the vaccine your recipient received.

Step 3 of 3: Confirm Appointment

Now, you will complete the 2nd dose appointment booking.

- 1. Click **COMPLETE APPOINTMENT**
- 2. Review the details of the scheduled appointment
- 3. The recipient will only receive a reminder notification if they provided an email and/or phone number and agreed to reminders when they scheduled their 1st dose appointment

Schedule Dose 2

2110 Blue Ridge Rd, Raleigh, North Carolina 27607 [Change](#)

Now that you have received your first dose, please choose a time for your follow up appointment.

✓

Appointment 2

Thursday April 15 9:00AM, 2021

×

Complete Appointment

< Back

✓

The Appointment is Scheduled.

Your confirmation code is

r5r9naxiek.

and an email has been sent to

ch*****@gmail.com

Appointment Details

Location

County General Hospital - Chicago ER

Location address

2110 Blue Ridge Rd, Raleigh, North Carolina 27607

Appointment 2: Date and time

Thursday April 15 9:00AM, 2021

Email

ch*****@gmail.com

Audience

Healthcare
Provider

Healthcare
Location
Manager

Tips

You will not be able to change the location of the appointment through the appointment confirmation email.

You must cancel the appointment and the new location must schedule the appointment for the recipient.


The confirmation code for the 2nd dose appointment is the same as the confirmation code for the 1st dose appointment.

Search Scheduled Appointments

Step 1 of 5: Navigate to Appointments Tab

Periodically, you may want to verify how many appointments have been scheduled for a specific day or period. Searching for upcoming appointments can be done from the Appointments Tab.

- 1. To begin, navigate to the **APPOINTMENTS** tab.



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You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
------	---------	-------------	----------

Audience

Healthcare
Provider

Healthcare
Location
Manager

Step 2 of 5: Review and Plan Appointments for the Day

You will first need to enter a date range.

- 1. Enter the specific dates in the two fields **FROM** and **TO**
- 2. Click **SEARCH**

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Recipient

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Vaccine Inventory

More

You are currently logged in as County General Hospital - Chicago ER

Appointments

All Appointments

9 items

Search Appointments

Search by Name, Location, Vaccine Status

Search Confirmation Number

From

2021-03-10

To

2021-03-10

Status

--- None ---

Search

Reset

Case

Confirmation N...

Date

Time

Recipient Name

DOB

Location

Vaccine Status

Status

<input type="checkbox"/>	03113945	r137tzquwk.1	Mar 9, 2021	6:39:41 AM	test test	1999-09-09	County General Hos...	Dose 1 Administered	Closed
<input type="checkbox"/>	03113949	n5k31u3179.1	Mar 9, 2021	7:03:00 AM	sked1 testuser	1989-10-03	County General Hos...	Dose 1 Administered	Closed
<input type="checkbox"/>	03113952	n5k31u3179.2	Mar 9, 2021	7:49:50 AM	sked1 testuser	1989-10-03	County General Hos...	Dose 2 Administered	Closed
<input type="checkbox"/>	03113943	fp316c8jc3.1	Mar 9, 2021	8:00:00 AM	Wonder Woman	1940-05-05	County General Hos...	Dose 1 Canceled	Canceled
<input type="checkbox"/>	03113939	gcdspjfp9n.1	Mar 9, 2021	8:00:00 AM	Wonder Woman	1940-05-05	County General Hos...	Dose 1 Scheduled	New
<input type="checkbox"/>	03113941	k6nxju95p.1	Mar 9, 2021	9:00:00 AM	N W W	1980-01-01	County General Hos...	Dose 1 Scheduled	New
<input type="checkbox"/>	03113960	drch74hi6.1	Mar 9, 2021	9:17:35 AM	sked2 testuser	1999-12-19	County General Hos...	Dose 1 Administered	Closed
<input type="checkbox"/>	03113973	njt65uisi7.1	Mar 9, 2021	12:00:00 PM	Thomas Reece Flowers	1991-03-10	County General Hos...	Dose 1 Scheduled	New
<input type="checkbox"/>	03113797	391nxsq8t.1	Mar 9, 2021	6:30:55 PM	Wonder Woman	1940-05-05	County General Hos...	Dose 1 Scheduled	New

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Audience

Healthcare Provider

Healthcare Location Manager

Tips

The number of appointments will show at the top left of the page.

Step 3 of 5: Search by Name, Location, or Vaccine Status

In the **SEARCH APPOINTMENT** field, you can search including recipient name, location name, or vaccine status. If multiple locations are available, you can enter the location name. Vaccine statuses include **DOSE 1 (or 2 or ADDITIONAL DOSE / BOOSTER) SCHEDULED**, or **DOSE 1 (or 2 or ADDITIONAL DOSE / BOOSTER) ADMINISTERED**.

- 1. Enter the keyword in the **SEARCH APPOINTMENTS** field
- 2. Click **SEARCH**
- 3. Click **RESET** to restore the standard view

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Healthcare
Provider

Healthcare
Location
Manager

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You are currently logged in as County General Hospital - Chicago ER

Appointments

All Appointments

4 items

Search Appointments

Dose 1 Scheduled

Search Confirmation Number

From

2021-03-09

To

2021-03-09

Status

--- None ---

Search

Reset

Cancel Appointment

<input type="checkbox"/>	Case	Confirmation N...	Date	Time	Recipient Name	DOB	Location	Vaccine Status	Status	
<input type="checkbox"/>	03113939	gcdspjfp9n.1	Mar 9, 2021	8:00:00 AM	Wonder Woman	1940-05-05	County General Hos...	Dose 1 Scheduled	New	
<input type="checkbox"/>	03113941	k6nxju95p.1	Mar 9, 2021	9:00:00 AM	N W W	1980-01-01	County General Hos...	Dose 1 Scheduled	New	
<input type="checkbox"/>	03113973	njt65uisi7.1	Mar 9, 2021	12:00:00 PM	Thomas Reece Flowers	1991-03-10	County General Hos...	Dose 1 Scheduled	New	
<input type="checkbox"/>	03113797	391nxsq8t.1	Mar 9, 2021	6:30:55 PM	Wonder Woman	1940-05-05	County General Hos...	Dose 1 Scheduled	New	

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Next

Step 4 of 5: Search by Using Recipient's Confirmation Number

For locations that enable the scheduling feature in CVMS, **recipients that book an appointment will be sent a unique confirmation code for their appointment.** You can search for a specific recipient's appointment using this confirmation code.

- 1. Enter the confirmation code in the field labeled **SEARCH CONFIRMATION NUMBER** field
- 2. Click **SEARCH**

Audience

Healthcare
Provider

Healthcare
Location
Manager

Home

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Appointments

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Bulk Registration

Vaccine Inventory

More

You are currently logged in as County General Hospital - Chicago ER

Appointments

All Appointments

1 items

Search Appointments

Search by Name, Location, Vaccine Status

Search Confirmation Number

gcdspjfp9n.1

From

2021-03-09

To

2021-03-09

Status

--- None ---

Search

Reset

<input type="checkbox"/>	Case	Confirmation N...	Date	Time	Recipient Name	DOB	Location	Vaccine Status	Status
<input type="checkbox"/>	03113939	gcdspjfp9n.1	Mar 9, 2021	8:00:00 AM	Wonder Woman	1940-05-05	County General Hos...	Dose 1 Scheduled	New

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Page 1 out of 1

Next

Step 5 of 5: Search by Appointment Status

Another helpful view is Appointment Status over to the right. Options include:

- New – recipients with an upcoming appointments
- Closed – scheduled recipients that completed their appointment
- Canceled – appointment canceled either by the recipient or by the provider

1. Select STATUS
2. Click **SEARCH**

Audience

Healthcare
Provider

Healthcare
Location
Manager

Tips

Search using the **NEW** status filter to quickly see which appointments were booked overnight.

Recipients can cancel their appointment in CVMS directly through a link included in the confirmation email or the text message.

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You are currently logged in as County General Hospital - Chicago ER

Appointments

All Appointments

4 items

Cancel Appointment

Search Appointments

Search Confirmation Number

From

To

Status

Search

Reset

<input type="checkbox"/>	Case	Confirmation N...	Date	Time	Recipient Name	DOB	Location	Vaccine Status	Status	
<input type="checkbox"/>	03113945	r137tzquwk.1	Mar 9, 2021	6:39:41 AM	test test	1999-09-09	County General Hos...	Dose 1 Administered	Closed	
<input type="checkbox"/>	03113949	n5k31u3179.1	Mar 9, 2021	7:03:00 AM	sked1 testuser	1989-10-03	County General Hos...	Dose 1 Administered	Closed	
<input type="checkbox"/>	03113952	n5k31u3179.2	Mar 9, 2021	7:49:50 AM	sked1 testuser	1989-10-03	County General Hos...	Dose 2 Administered	Closed	
<input type="checkbox"/>	03113960	drch74hii6.1	Mar 9, 2021	9:17:35 AM	sked2 testuser	1999-12-19	County General Hos...	Dose 1 Administered	Closed	

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Cancel Scheduled Appointments

Step 1 of 5: Navigate to Appointments Tab

If a scheduled appointment needs to be cancelled, you can cancel it and notify the recipient of the reason for cancellation.

To begin, navigate to the **APPOINTMENTS** tab.



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Recipient

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Vaccine Inventory

More

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
------	---------	-------------	----------

Audience

Healthcare
Provider

Healthcare
Location
Manager

Step 2 of 5: Search for the Recipient by Name, Appointment Date, Confirmation Code, and/or Vaccine Status

You will first need to find the appointment you wish to cancel. You can search using the recipient's name or confirmation code as well as filter by the date and/or status.

- 1. Search for the appointment(s) you need to cancel

Audience

Healthcare
Provider

Healthcare
Location
Manager

Home

Recipient

Appointments

Help & Information

You are currently logged in as Clinic Org1

Appointments

All Appointments

3 items

Search Appointments

Search Case/Confirmation Number

From

2021-04-01

To

Status

--- None ---

Search

Reset

3 records found.

<input type="checkbox"/>	Case	Confirmati...	Date	Time	Recipient ...	DOB	Location	Cancellatio...	Vaccine ...	Status	
<input type="checkbox"/>	03499186		Apr 12, 2021	1:11:27 PM	Walkin Example	1965-12-12			Dose 1 Schedul...	New	<input type="button" value="v"/>
<input type="checkbox"/>	03499652		Apr 12, 2021	6:07:01 PM	Steve Rodger	2000-01-01			Dose 1 Schedul...	New	<input type="button" value="v"/>
<input type="checkbox"/>	03499746	d75449mzu5.1	Apr 12, 2021	7:00:00 PM	Peter Parker	2000-03-03			Dose 1 Schedul...	New	<input type="button" value="v"/>

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NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

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Step 3 of 5: Cancel Up to 20 Appointments

You can cancel up to 20 appointments at a time.

- 1. Click the checkbox at left of the appointments you wish to cancel (up to 20)
- 2. Click the **CANCEL APPOINTMENT** button in the upper right.

Home

Recipient

Appointments

Help & Information

You are currently logged in as Clinic Org1

Appointments

All Appointments

3 items

Cancel Appointment

Search Appointments

Search Case/Confirmation Number

From

To

Status

Search by Name, Location, Vaccine Status

2021-04-01

--- None ---

Search

Reset

3 records found.

<input type="checkbox"/>	Case	Confirmati...	Date	Time	Recipient ...	DOB	Location	Cancellatio...	Vaccine ...	Status	
<input checked="" type="checkbox"/>	03499186		Apr 12, 2021	1:11:27 PM	Walkin Example	1965-12-12			Dose 1 Schedul...	New	
<input type="checkbox"/>	03499652		Apr 12, 2021	6:07:01 PM	Steve Rodger	2000-01-01			Dose 1 Schedul...	New	
<input type="checkbox"/>	03499746	d75449mzu5.1	Apr 12, 2021	7:00:00 PM	Peter Parker	2000-03-03			Dose 1 Schedul...	New	

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Audience

Healthcare
Provider

Healthcare
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Manager

Tips

The ability to cancel 20 appointments at a time can be particularly helpful if you have a capacity issue and need to quickly cancel some appointments for the day that cannot be reassigned.

Step 4 of 5: Provide Cancellation Reason and Cancel Appointment

If the appointment was made through the scheduling feature in CVMS *and* the Recipient opted “in” for receiving text and/or email notifications, they will be notified of the cancellation.

- 1. Input a reason for cancelling the appointment(s) from the drop-down menu (you may optionally add a cancellation description in the free text field)
- 2. Click the **CANCEL APPOINTMENT** button to confirm the cancellation

Note: *If the recipient did not sign up for text and/or email notifications as their preferred method of contact, they will not know that the appointment has been cancelled.*


Audience

Healthcare
Provider

Healthcare
Location
Manager

Tips

You may want to follow up with a call to the recipient even if they have signed up to receive notifications just to make sure they saw the cancellation.



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Help & Information

You are currently logged in as

Appointments

All Appointments

3 items

Cancel Appointments

DATE	TIME	RECIPIENT NAME	DOB	PROVIDER LOCATION	CANCELLATION REASON	CANCELLATION DESCRIPTION
Apr 12, 2021	01:11 PM	Walkin Example	1965-12-12	Clinic Org1	<div><div>choose one...</div><div><div>choose one...</div><div>Duplicate</div><div>Recipient Pre Appointment Cancellation</div><div>Insufficient Inventory</div><div>Recipient Refusal</div></div></div>	

Cancel Appointment

Status

--- None ---

Search

Reset

Status

Case

03499186

Apr 12, 2021

1:11:27 PM

Walkin Example

1965-12-12

Dose 1 Scheduling

New

03499652

Apr 12, 2021

6:07:01 PM

Steve Rodger

2000-01-01

Dose 1 Scheduling

New

03499746

d75449mzu5.1

Apr 12, 2021

7:00:00 PM

Peter Parker

2000-03-03

Dose 1 Scheduling

New

Previous

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Next

Step 5 of 5: View Appointment / Cancellation History

To view a record of a Recipient’s appointment history, navigate to the Recipient tab, locate the Recipient’s record, and select **RELATED** tab. The Recipient’s appointment records will appear. Selecting an appointment record will bring up the details of that appointment, including a **CANCELLATION REASON** if applicable.

Home

Recipient

Appointments

Help & Information

Person Account

Walkin Example

Eligibility Status

Approved

Priority

Phase 1a

Recipient Dose Status

Dose 1 Canceled

DETAILS

RELATED

Appointments (2)

Appointment	Date and Time of Vaccin...	Vaccine Status	Vaccine
00111719		Dose 1 Canceled	
00111716		Registered	

Home

Recipient

Appointments

Help & Information

DETAILS

RELATED

Account Name

Clinic ABC Loc 1

Contact Name

Walkin Example

Appointment DateTime

1/13/2021, 3:59 PM

Cancellation Reason

RECIPIENT CANCELLED

Vaccine Status

Dose 1 Canceled

Vaccine

Vaccine Inventory

Injection Site

Audience

Healthcare Provider

Healthcare Location Manager

Tips

You may need to reschedule the appointment if the recipient has not already received their vaccination. **If they did *not* sign up for the text and/or email notifications, they will not receive a booking confirmation.**

Automatic Cancellations

There are a few scenarios that may result in an automatic cancellation:

1. If a Recipient appears in **TODAY'S APPOINTMENTS** (either through the Appointment Walk-In process or due to a scheduled appointment) but does not complete their appointment within 72 hours, the appointment will be **AUTOMATICALLY** cancelled, and their Dose Status will update to **DOSE 1 (or 2 or ADDITIONAL DOSE / BOOSTER) CANCELLED**.
2. If a Recipient creates multiple appointments (for example at different locations in hopes of being vaccinated as quickly as possible), all the remaining appointments will be automatically cancelled as soon as one of the appointments is changed to an **ADMINISTERED** status.
3. Providers using CVMS Direct (Electronic Health Record system integration with CVMS) may also notice cancelled appointments appearing in the system. Those appointments are created during the integration process and will be automatically cancelled and marked as **DUPLICATE** as they are a replica of the scheduled appointment.

Audience

Healthcare
Provider

Healthcare
Location
Manager


Appendix


Additional Notes

Key Items:


Hyperlinks appear as light blue and will provide additional information or navigation.

* **Asterisks** are used to denote required information.

 A Toggle can be clicked to see selectable options.

 A Pen can be clicked to make edits to the field.

  Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.

 A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge browsers to access CVMS.
- For more information on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and older versions of Edge browsers are not compatible with CVMS.

User Guide Change Log (1 on 3)

Version	Date of Change	Changes Made	Author
1	12/1/2020	<ul style="list-style-type: none"> Initial document 	Azalea Troche
2	12/18/2020	<ul style="list-style-type: none"> Added Create Recipient, Register Recipient sections, updated Process Flow, added Generic Employer List, eligibility criteria Added Patient Verification and Screening page, Removed mention of Adverse Reaction Annotation, clarified On Behalf Of (Clinician), added Schedule Follow-up Page Updated Process for recipients that are not Eligible yet / Not Approved 	Steve DiGangi
3	1/15/2021	<ul style="list-style-type: none"> Updated instructions for Creating Recipient Updated Screenshots Updated instructions for Appointment Booking (select a location) Updated Understanding How Recipient Eligibility Status is Determined Section Removed any mention of the 2 CVMS Help Desk emails. Added CVMS Help Desk Portal information Added "What to do if a Recipient received their first dose through a LTC/Pharmacy" section Added Cancelling an Existing Appointment Section Updated screenshots to include updated branding, Appointments tab, Second Dose warning label, and new Vaccine Route Included information about recipients who may receive a first dose outside of CVMS 	Steve DiGangi Courtney Seward
4	1/26/2021	<ul style="list-style-type: none"> Added in Updated Priority Group Tiering Logic Corrected Priority Tiering Screenshots Added screenshots to include Location Switcher button Added Location Switcher button explanation section Added new section: Edit Vaccine Administration Details After Submission Added new section: Edit Vaccine Administration Recipient 	Steve DiGangi
5	2/9/2021	<ul style="list-style-type: none"> Added new section on Editing Recipient Registration Information Updated section titles in TOC 	Steve DiGangi
6	3/4/2021	<ul style="list-style-type: none"> Added information about single-dose products Updated eligibility branding to Vaccine Group Removed priority tiering logic and eligibility visibility Removed eligibility branding to replace with Vaccine Group Updated screenshots to correct branding (DOB & Middle name fields, vaccine group) 	Steve DiGangi

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Version	Date of Change	Changes Made	Author
7	3/10/2021	<ul style="list-style-type: none"> Updated Overview slide Updated branding to include Recipient Check-In tool Updated Cancelling an Existing Appointment section Added Appointment Confirmation Number usage Added Book Second Dose Appointment section Created new section to cover scheduled appointments 	Steve DiGangi
8	4/16/2021	<ul style="list-style-type: none"> Removed explanations on 2nd dose appointment cancellations Removed Eligibility definition Updated branding to remove Vaccine Group and add date/product of vaccination Added search by email address in Recipient tab Added Cancellation changes for 24-hour automatic cancel after a no-show, automatic cancellation if there are duplicate appointments, and cancel reason picklist Added new section on marking recipient deceased Removed slide concerning inactive Vaccine Groups Updated Cancellation branding with picklist Removed guidance to enter recipient demographic information from 1st dose appointment booking 	Steve DiGangi
9	5/05/2021	<ul style="list-style-type: none"> Updated branding to change "Long term care/federal pharmacy programs" fields Added Generate PDF button 	Kaitlin Gates
10	5/16/2021	<ul style="list-style-type: none"> Updated Cancel Appointment section to show if an appointment was cancelled automatically Added updated QR code to PDF 	Steve DiGangi
11	6/13/2021	<ul style="list-style-type: none"> Updated screenshot of registration form Updated auto-cancellation rule to reflect 72-hour cancellation after no-show appointments 	Steve DiGangi
12	6/30/2021	<ul style="list-style-type: none"> Added Address Line 2 field Updated branding of screenshots Added Remove Vaccine Administration section Added note about being unable to blank-out information on a vaccine administration in an effort to remove the record 	Steve DiGangi

User Guide Change Log (3 on 3)

Version	Date of Change	Changes Made	Author
13	07/30/2021	<ul style="list-style-type: none"> Consolidated user guides and updated links Rewrote user guide overview Added ability to book, administer, cancel, and view 3rd doses (known as Additional Dose on the Vaccine Administration page) Added information on logging Dose 1 administration after Dose 2 has already been logged Removed 'Proof of Vaccination' tab as Vaccine Information PDF is now used Added section on Report Vaccine Information 	Steve DiGangi
14	08/17/2021	<ul style="list-style-type: none"> Added new CDC guidance regarding additional doses 	Steve DiGangi
15	8/26/2021	<ul style="list-style-type: none"> Updated reason for Vaccine Administration removal 	Steve DiGangi
16	9/10/2021	<ul style="list-style-type: none"> Updated Appointment Walk-in DOB Format New consent language for Vaccine Administrations Updated language for FDA-Approved Pfizer vaccine Updated Vaccination Log Screenshots and explanation Revised guidance on Additional Doses up to 6 total administrations 	Steve DiGangi
17	9/20/2021	<ul style="list-style-type: none"> 16, 18, 54-55, 61, 81, 87, 90-91, 93, 100, 133, 143: Updated guidance and screenshots for Additional Dose / Booster 2: Help Desk Hours Updated 	Steve DiGangi
18	10/20/2021	<ul style="list-style-type: none"> 92, 93 – Added to reflect new J&J and Moderna Additional Dose/Booster updates 	Darrell Lee
19	12/17/2021	<ul style="list-style-type: none"> 24, 67 - Additional/Booster Dose notification name validation 	Kaitlin Gates
20	1/11/2022	<ul style="list-style-type: none"> Removed “long term care/federal pharmacy program section” references, for updated recipient tab 40-45: Updated info regarding pharmacy recipients 	Kaitlin Gates
21	02/07/2022	<ul style="list-style-type: none"> Removed “Exception 2: Recipient Record is Created in CVMS, but Recipient did not Complete Registration” Removed Exception 3: Recipient was Vaccinated by a Chain or Retail Pharmacy” Updated Table of Contents 	Niya Nelson
22	2/10/2022	<ul style="list-style-type: none"> Updated guidance for pharmacy recipients on Recipient Tab and on Vaccination Logs 	Steve DiGangi
23	4/1/2022	<ul style="list-style-type: none"> Added information on 2 character minimum for Recipient's Name 	Kaitlin Gates